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ABSTRACT

This Systems and Procedures Exchange Center (SPEC) kit on Bibliographic Instruction (BI) in Association of Research Libraries (ARL) examines current developments as well as anticipated trends based on a SPEC telephone survey of 25 ARL libraries with active BI programs. Two themes which ran through the mid-1985 interviews were the use of new technology in BI programs and the expansion of programs to reach more diverse audiences. The kit contains: (1) BI planning materials from seven libraries (Duke University, Ohio State University, Michigan State University, University of North Carolina, Brown University, Temple University, and University of California at Riverside); (2) three examples of computer-assisted instruction (CAI) programs and microcomputer-based instruction (University of Florida, University of Delaware, and University of California at Berkeley); (3) two descriptions of graduate student instruction (Ohio State University and Colorado State University); (4) one description of international student instruction (University of California at Davis); and (5) a select bibliography. (THC)

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#121 FEBRUARY 1986
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BIBLIOGRAPHIC INSTRUCTION IN ARL LIBRARIES

Although the roots of bibliographic instruction (BI) can be traced back a century, it was not until the late 1960s and early 70s that the popularity of orientation and library instruction activities led to formal BI programs in many academic libraries. Because of changing interests and needs over the past 15 years, the definition of bibliographic instruction, also called library use instruction or user education, has shifted. In the early 1970s, BI programs tended to concentrate on how to obtain information in a particular library building; today the goal more often is to teach patrons how to tap into any information source. And whereas BI formerly focused on teaching the use of the card catalog and periodical indexes, today BI extends to instruction in the use of various automated resources such as online catalogs, end-user terminals, and microcomputers. Teaching methodologies still include the traditional tour and lecture, but libraries also are experimenting with innovative instructional methods.

A previous SPEC Kit, *#17 Library Use Instruction*, covered practices when it was published in 1975 and then updated in 1977. This February 1986 Kit examines current developments as well as anticipated trends based on a SPEC telephone survey of 25 ARL libraries with active BI programs. Two themes which ran through the mid-1985 interviews were the use of new technology in BI programs and the expansion of programs to reach more diverse audiences.

DEVELOPING TECHNOLOGY. A number of ARL libraries are gearing up to teach patrons the intricacies of online public access catalogs. Teaching the use of the online catalog includes training the staff as well as users. Instruction librarians often conduct staff training programs, as well as prepare handouts and conduct workshops and training sessions for online catalog users. End-user searching is another activity spawned by new technology that requires the expertise of instruction librarians. End-users need basic information on how to do their own searching, in addition to information on how to select databases and vendors. *SPEC Kit #122* (scheduled for March 1986) deals specifically with library services to end-users.

The microcomputer is another relatively new technology that has affected the activities of instruction librarians. Using microcomputers, some BI librarians are preparing computer-assisted instruction packages forlarge groups of patrons, library staff, and student workers. Because CAI programs are time-consuming to prepare and require special expertise, several libraries are beginning to market programs they have developed.

The growing availability of microcomputers also has brought about increasing interest on the part of faculty, students, and other end-users in learning how to create bibliographic files by downloading and how to organize personal information files. A few libraries are offering instruction in these areas. And BI librarians also are instructing library staff to use microcomputers for word processing, spreadsheets, and database management software packages. Microcomputers also are making is easier to produce and revise bibliographies, handouts, and signs for BI.

CHANGING AUDIENCES. BI programs in the 1960s and 1970s were structured primarily for entering students, emphasizing orientation to the library building and instruction in the use of basic library tools. These orientation programs are well developed, with a variety of teaching methods and materials. Today, some of these earlier labor-intensive orientation programs are being replaced with technology-based or team-teaching programs. Another reported trend in some universities—to include "writing across the curriculum" as a requirement—opens up more possibilities for library use instruction in new subject areas.

Over the next five years, a number of librarians reported, they will be expanding services to existing user groups with particular emphasis on faculty and upper-level undergraduates, as well as reaching out to wider audiences. More activities will be developed for non-traditional students including returning adults, the disabled, international students, and students at sites removed from the central campus. Some libraries are experimenting with extension services to remote areas, using computer databases and telefacsimile to transmit information to patrons who do not have physical access to the central library. Patrons at these distant locations need special training to make full use of the new technology at their command.

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CHANGING LIBRARIAN ROLES. It appears that BI is an activity that affects nearly all reference librarians, and is included in most of their position descriptions. Technical processing librarians also are becoming more involved in BI: With their knowledge of syndetic structure of library catalogs, subject authority files, and the MARC record, catalogers often are called upon as consultants in the preparation of handouts and point-of-use instructional aids for online catalogs, and some are teaching library users. With more types of librarians involved in instruction, there are more opportunities to address the specialized needs of upper-level undergraduates, graduate students, and faculty.

BI programs are growing in depth as they advance from ad hoc activities concentrating on orientation to structured programs drawing upon the resources of the library, campus, higher education climate, and other disciplines. Librarians are adopting a variety of teaching techniques that are new to the BI field. Traditional tours and lectures are being replaced with instructional methods such as guided discussions, simulation, case studies, CAI, and direct involvement in problem solving. BI is affected as well by the practices of faculty outside the library. The traditional lecture/reserve room reading/term paper approach to teaching still exists, but faculty are supplementing it with individual and group projects which require the evaluation and analysis of secondary and primary sources.

In some cases, BI librarians are leading the way in creating an awareness of and support for BI in disciplines outside library science: A number of staff have presented papers and published in journals of professional associations not directly related to the library field. Meanwhile, continuing education courses and conferences are providing more varied training for BI librarians, while a few library schools are offering courses in bibliographic instruction.

SUMMARY. The future of bibliographic instruction is closely tied to the changes that are occurring in higher education and the effects of new technology on traditional library services. As the library shifts from a place for finding documents to a center for providing access to information in multiple locations and formats, BI programs will be called upon to develop new ways to facilitate patrons' access to that information.

Rather than looking at BI as another reference service, libraries are beginning to define a broader role for library use instruction in the university of the future. And as changes in BI programs are developed, one place to start is with faculty and university administrators, informing them of expected changes and eliciting their involvement and support.

The SPEC Kit on Bibliographic Instruction in ARL Libraries (#121, February 1986, 107 pages) includes BI planning materials from seven libraries, three examples of CAI programs and microcomputer-based instruction, two descriptions of graduate student instruction, one description of international student instruction, and a select bibliography.

* * *

This Kit was prepared by
Carol F. Ahmad, Assistant Director for Public Services,
University of Miami, as part of the
OMS Collaborative Research-Writing Program.

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Planning Documents

Duke University, June 1985

1984-85 Library Instruction Summary for Perkins Library

Statistics

Summer 1984

TIP = 15 (JR-Psychology)

TIP = 20 (KB-American History)

Botany 043 (Ecology and Society) = 18 (JR)

Fall 1984

English 1, 78x15 = 1170 (KB,MWC,BC,EGG,DH,JL,IN,CO,LJS,JV)

English Department graduate students = 8 (MWC)

Geology graduate students = 6 (JR)

Political Science graduate students = 6 (IN)

UNC-CH Romance Languages graduate students = 15 (IN)

History 197S (Senior Honors Seminar) = 6 (KB)

History 301 (Research Seminar in History) = 11 (KB,EGG)

Development Office staff, 5+2 = 7 (BC)

Political Science 163 (Women in Developing Societies) 17x2 = 34 (IN)

North Carolina Central Library Science graduate students = 7 (IN)

Spring 1985

English 1, 6x10 = 60 (IN)

History 308 (Seminar on American History) 4+5 = 9 (KB)

Sociology graduate students = 3 (BC)

IDC 160S (Crisis in the Renaissance) = 15 (IN)

Summer 1985

TIP = 17 (JR & AJ-American History)

NEH Seminar (Prof. Hauerwas) = 11 (JR)

IN
6-85

WOULD YOU ATTEND A MORE ADVANCED VERSION OF THE TYPE OF PRESENTATION MADE BY THE LIBRARIAN IN YOUR ENGLISH 1 CLASS?

	# of Responses	1	2	3	4	5	6
1983	643	16.2%	18.5%	14%	15.9%	27.4%	8.1%
1984	642	22%	22.4%	12.6%	12.9%	21.3%	8.7%

WILL THE INFORMATION ABOUT FINDING AND USING RESOURCES BE OF VALUE IN COURSES OTHER THAN ENGLISH 1?

	# of Responses	1	2	3	4	5	6
1983	635	36.5%	34.3%	16.7%	5.2%	3.15%	4.1%
1984	642	46.4%	31.8%	12.6%	3.7%	3.1%	2.3%

Added to the encouraging results of the evaluation, we have David Nahmias's report that in the university's recent student survey of the English 1 program, students commented that conferences with their instructors and the presentations made by the librarians to their classes were the two positive aspects of the English 1 course.*

We do not anticipate that the change in the freshman writing program will alter in any signigicant way our offering of library instruction to the freshmen. In fact, we look forward to working with the newly appointed University Writing Specialist in bringing about further improvements in the library instruction program.

Duke University
Durham
North Carolina 27706

William R. Perkins Library

MEMORANDUM

TO: Robert Byrd,
Acting Head, Manuscript Department
Marie Clark,
Head, Public Documents & Maps Department
Dr. George Gopen,
University Writing Specialist, English Department
Bill Gosling,
Assistant University Librarian for Technical Services
Ashley Jackson,
Head, Newspapers & Microforms Department
Bill Lipscomb,
Vice President of Academic Affairs, ASDU
Ilene Nelson,
Reference Librarian
Kitty Porter,
Head, Chemistry Library

FROM: John Lubans, Jr.,
Assistant University Librarian for Public Services

SUBJECT: Library Instruction Committee

I am writing to invite you, or your designate, to participate in the Library Instruction Committee which is being created within the Perkins Library system's Public Services Division. The committee's charge is as follows:

> The Perkins Library Instruction Committee will be a working committee dedicated to developing, implementing, and coordinating instruction in the use of library resources at Duke University. The committee's long term goal is an integrated, gradated program of instruction in which basic identifying and finding skills will be the foundation and skills of interpretation and evaluation the culmination. The short term objectives are to develop or refine individual learning opportunities for all library users: undergraduates, graduates, and faculty.

Replacement of English 1 by a series of university writing courses, with a view toward writing-across-the-curriculum, suggests potentially greater use of library resources by students. Similarily, the advent of the on-line card catalog signals a dramatic change in the accessibility of the collection. These and other factors make this an opportune time for the formation of the Library Instruction Committee.

The Library Instruction Committee will serve as a vehicle for focusing ongoing instructional efforts and for implementing new programs. Our user surveys (English I and the recent survey of a sample of all Duke students) confirm, conclusively, that students would like to have more opportunities in which to learn about the library's resources. Also, as you may recall, during the faculty survey seventy faculty expressed an interest in library research workshops, an interest which has not yet been met.

I hope you are able to accept my invitation. The structure of the committee includes 10 members chaired by the Reference Department's library instruction coordinator; in some instances a member may represent two categories.

1. Coordinator of Library Instruction, Reference Department (Ilene Nelson)

2. Branch librarian (annual revolving appointment) (Kitty Porter)

3. A Public Documents librarian

4. A Manuscript librarian

5. Assistant Professor of English (Dr. George Gopen)

6. Student representative (to be appointed by ASDU per Bill Lipscomb)

7. Technical Services representative

8. Chairman of the Orientation and tour Committee, ex officio (Ashley Jackson)

9. Assistant University Librarian Public Services, ex officio (John Lubans, Jr.)

10. Head, Reference Department, ex officio (vacant)

As necessary, the committee will form task forces. One extant group, the Teaching Seminar Committee, is now a subcommittee of the Library Instruction Committee.

I look forward to your decision. An organizational meeting will be held as soon as your responses are in.

Thank you.

JL/bcb

10

Duke University
Durham
North Carolina 27706

William R. Perkins Library

MEMORANDUM

TO: Members of the Library Instruction Committee

FROM: John Lubans and Ilene Nelson

DATE: September 20, 1985

SUBJECT: Background Information

Thank you for agreeing to serve on the Library Instruction Committee. As you know, the committee has a charge which will guide its activities. In review, it states:

> The Perkins Library Instruction Committee will be a working committee dedicated to developing, implementing, and coordinating instruction in the use of library resources at Duke University. The committee's long term goal is an integrated, gradated program of instruction in which basic identifying and finding skills will be the foundation, and skills of interpretation and evaluation the culmination. The short term objectives are to develop or refine individual learning opportunities for all library users: undergraduates, graduates, and faculty.

The committee will primarily be concerned with taking the larger view of library instruction in the Perkins system, with the planning and coordination of instructional activities. We will participate both in setting long-range goals and in initiating and implementing specific projects. An immediate concern will be introducing viewers to the online catalog. We will involve people from outside the committee in our activities whenever it is appropriate.

The following statements describe various kinds of information/ instruction programs which may be of interest to us:

A formal program of regularly conducted instructional meetings with groups of the library's users. This would involve identifying a course or particular group of users and developing a continuing liaison. Some groups which come to mind are new faculty, graduate students, juniors, and freshmen.

We might also want to consider another category of formal presentations which would be offered on a varying schedule, depending upon demand, to various audiences, and have varying content. Some possibilities are a formal course offered for credit, house courses, teaching seminars (for library staff), on-demand lectures (primarily a single presentation to a class working on a specific assignment requiring the use of library materials).

Point-of-use instruction--to include printed and, possibly, automated formats to be used by individual library users at the time and point instruction is needed.

All of these ideas are presented as a basis for discussion at the committee's first meeting which has been scheduled for 10:00 a.m. on Monday, September 30, in Perkins 220A. Please call John Lubans at 684-2034 to say whether or not you will be able to attend.

JL/jaw

cc: Jerry Campbell
AUL's

Perkins Library
Presentation Skills Workshop: "Teach Easy"
Summary Report

On July 21, 1983 twenty interested librarians from the Perkins library system met with Marjorie Abrams, Manager of Training and Development for Duke University, for a workshop aimed at improving presentation skills. Dr. Abrams began by discussing the nervousness and anxiety that nearly everyone faces in standing up in front of a group.

Following this introduction, she led the group in preparing a list of needs to be addressed by this workshop, and then presented her agenda for the session. After a discussion of the elements of the worst and best presentations people had witnessed, the group broke into smaller groups to discuss what each person hoped to get out of the workshop.

All the above devices illustrated different elements of effective presentations according to Dr. Abrams. A very important maxim for any presentation is that the more you teach, the less your audience learns. To the extent that you can get a student to identify their own motivation for learning what you have to teach, you have a learner. Otherwise you only have a listener. The maximum effective length of a presentation, Dr. Abrams said, is 15 to 20 minutes. This brought a lot of comment from the audience, all being accustomed to the routine academic idea of 50 minute class periods. Dr. Abrams then discussed ways to vary a presentation to involve the class more. People need to talk, so the more you can get your audience involved in your presentation, the better. Small group discussions are also good for releasing the pent-up energy of a group.

There are two different ways to approach presentation skills. The first is the traditional approach, looking at characteristics of the presentor. These characteristics involve such elements as:

1) Stimulus variation - stimulating the audience using as many different devices as possible such as gestures, movement, tone of voice, use of attention getting material or behavior.

2) Set induction - using such means as analogies, demonstrations, or leading questions to get students thinking about a topic.

3) Closure - bringing learning to a close by summarizing material or providing new conceptualization. A presentation should include as many closure points as possible.

4) Silence and nonverbal cues - using nonverbal message to move discussion. Silence can be an effective way to get silence. If you ask a question to which you want an answer, bite your tongue and count to six. Smiling and nodding are other cues that can be used to encourage audience response.

5) Reinforcement of student participation - using verbal and nonverbal messages to encourage control participation. Use positive responses to draw responders out; check for clarification; repeat the question for the group; generate people's opinions by asking nonthreatening questions, i.e. ones with no "right" or "wrong" answers. Set the tone at the beginning of the presentation by using such statements as "I'll be asking you some questions."

6) Questions - using clear and stimulating questions.

7) Examples - using examples, both verbal and visual, to clarify and stimulate discussion.

After presenting this list, Dr. Abrams suggested that each person choose one or two of these points and work on them for their next presentation.

The second approach to skills development is to focus on the content of the presentation rather than on the presentor. The important points to consider here are:

1) Make your presentation concise, almost always less than 20 minutes of content.

2) Know where you, as the speaker, are going.

3) Speaker and audience should be comfortable with each other.

4) Presentation should be conversational with a minimum of jargon, a two-way event.

5) Material should be detailed and interesting to audience.

6) The audience must feel it can interact with the presentor because it is not be talked at.

7) Speaker must use audiovisual aids that are clear and easy to use.

An edited video tape of English I presentations by Ilene Nelson, Mary Canada, and John Lubans (produced by Ilene Nelson) was used to demonstrate some classroom techniques. (This 20 minute edited version is available for viewing in the Audio Visual Room).

Dr. Abrams then discussed knowing your audience and what they need to know rather than focussing on what you want to tell them. This generated a good deal of discussion.

The workshop closed with each person writing for himself/herself a summary of a few important things learned from this workshop. This was then presented as an example of closure as well as an effort by Dr. Abrams to make sure that her content was in fact learned by the audience.

Participants in the workshop left feeling very enthusiastic about Dr. Abrams presentation and some also felt a little embarrassed about what they had been doing in the past in light of her revelations.

Summary by
Kitty Porter for the
Teaching Seminar Committee
August 3, 1983

Perkins Library
User Education Goal-Setting Workshop
Summary Report

The librarians of the Perkins Public Services Division met on the afternoon of January 18, 1983, to discuss user education at Duke University. In his introductory remarks John Lubans identified the purposes of the meeting as examination of current user education activities, formalization of an approach to user education, and establishment of the direction that user education at Duke will take in the near future.

The workshop was divided into three phases of activity. By way of creating a sense of context for the topic, three faculty members and a graduate student offered their perspective of library user education in the university educational process. Following the faculty presentations and questions/answers, the workshop participants discussed in small groups several user education issues. Finally, summaries of the small group discussions were brought before all of the participants for review.

The faculty members on the program were Ron Butters, Supervisor of Freshman Instruction in English, Duke; Ray Gavins, Associate Professor of History, Duke; and Erika Lindemann, Director of Composition, University of North Carolina - Chapel Hill. Erika Lindemann was accompanied by Judy Brazinsky who is a graduate student in English at UNC, but who also works for the English Department as the liaison with the library for library instruction.

Ron Butters described the goals of Duke's English I program. He explained the trend in the course away from experiential writing assignments to those which require students to critically assimilate literature on a subject and then create their own conclusion. The focus of the course is independent research in diverse subjects, an approach which should serve students well in their academic careers and their lives. Ron told the group that English I students benefit from the library instruction they receive in several ways. They learn that they can use the resources of the library for more than just obtaining unrelated bits of information. They are led to discover, in fact, that they can learn to resolve complex research problems by using library resources. In addition, Ron suggested that library instruction dissolves barriers to use of the library by getting the students into the building and introducing them to librarians. During the question and answer period Ron referred to the "reservoir of good will" which exists in the Duke community for the library staff.

Erika Lindemann gave a general overview of the library instruction programs for English I and II at UNC, and Judy Brazinsky related some of the more specific details of their ongoing implementation. Both speakers stressed the importance of coordination and communication. It is Erika's belief that one of the significant concepts imparted to students by library instruction is that there is an

efficient way to do research. She was also emphatic that it is most appropriate for librarians, as trained professionals, to instruct students in the use of library resources.

Ray Gavins began his presentation by describing himself as a "Perkins partisan" and establishing his position that a linkage between the university classroom and the library is essential. For several years he has assigned library research projects in two courses into which he has incorporated a library instruction component taught by librarians from the Manuscripts, Documents, and Reference Departments. His intention in assigning these projects is to introduce students to sources historians use; to demystify the process by which history is written. Ray has found librarians to be "golden" in their work with his students. He feels that librarians have also fostered a positive image of library use among his students.

In 1979 the History Department at Duke included in the general course instruction guidelines the endorsement of the assignment of research papers in all appropriate history courses in order to initiate students into the process of historical methodology. Ray announced at the conclusion of his remarks that he will soon propose to his department that they initiate a more formal commitment to student library use by establishing a program of library instruction similar to the one already in place for English I.

The panelists entertained questions from the workshop participants after all four presentations had been made. In the course of the ensuing discussion they agreed that word-of-mouth is an effective way to generate more requests for library instruction. The two Duke panelists also encouraged the librarians to work with UFCAS if they wish to generate official support for library user education.

Following a brief coffee break during which the panelists left the meeting, John Lubans introduced the discussion phase of the workshop. At this time the participants divided into three predetermined groups to consider four questions relating to library instruction at Duke University. All three groups were given the same questions and asked to summarize the discussion of each for consideration by the group-at-large in the final portion of the workshop.

The discussion guide given to all participants during the workshop is prefaced by a statement from the 1978 Long Range Planning Committee Report:

> It is the principal objective of Public Services in the Duke University Libraries to enhance the University's use of Library resources and to facilitate access to materials and information... Essential components of this service include: location assistance; ... in-depth reference assistance, and explanation of reference tools and/or bibliographic guides and indexes; explanation of the card catalog; ... (and) any other insruction in Library use, be it individual or group, that may help the University community ... fulfill its mission. (Page 53, Long Range Planning... 1978).

Question I refers to this statement:

> We appear to have an overall goal of user education in the above. Is there consensus? Modifications? What are the implications of this for us as a Division, for all of us, for some of us, for Duke?

The three groups agreed in principle with the Planning Committee's statement. One group characterized it as "a good, comprehensive expression of the overall goals of user education." Two groups expressed the concern that while user education should be the primary objective of public services, all Duke librarians should devote appropriate consideration and participation to user education. Two groups considered the potential audience of user education programs with one of the groups stating that the needs of the entire Duke community should be examined, not just those of the students. Another group wondered how much responsiblility we should assume for offering user education to groups outside the University. Finally, two groups agreed that a commitment to user education implies demonstrated suppport from the University administration in terms of staffing, equipment, and support services, etc. In addition, there is a need for the definition of the priority user education is to be given in the context of essential library services.

The second topic considered was identified as "Resources/limitations within status quo." For ease of discussion this topic was divided into "Staffing" and "Types of instruction" as follows:

> Staffing. Who should instruct in a general program on library use? Please consider and then rank: all public services librarians; a committee chaired by Library Instruction Coordinator - specify whether library-wide or divisional..., volunteers; Reference Librarians; others.

There was unanimous agreement that there should be a system-wide coordinator for user education. Whether this should be the AUL for Public Services, a member of the Reference Department, or some other public services librarian was not agreed upon. Two groups recommended a committee be formed to work with the coordinator to determine direction and provide public relations, evaluation, and liaison with teaching faculty. Librarians, interested faculty, graduate students and interns were suggested by one group as possible instructors for user education programs. There was agreement that volunteer instructors should be sought from throughout the library system, although public services should assume the major responsibility. Some concern was voiced that system-wide coordination of user education should be flexible enough to permit branch librarians to make independent arrangements for subject-specialized on-demand instruction.

Question II-B concerned methods of instruction as described below:

> Types of instruction within resources/limitations above. Please consider and then rank: mediated instruction: slide-tape, point-of-use, printed guides? English I: continue as is, expand, move to machine assistance, e.g. T.V.? Credit course in interdisciplinary bibliography on an introductory level: develop, examine feasibility? Tours: continue as is, modify, machine aid? Subject classes: continue, expand via promotion to faculty, decrease? Other?

The three groups treated this issue by suggesting appropriate formats for specific levels of user education; i.e., orientation, library instruction, and bibliographic instruction.

For orientation (introduction to physical facilities and services) all three groups listed tours as the preferred method of education. There was a clear consensus that the tours should be personally conducted with printed guides or automated programs available as supplements. The sentiment was that personal tours convey an atmosphere of helpfulness and cordiality which is desirable. One group also urged that passive orientation such as a coordinated sign system should be given a high priority.

In the area of library instruction (in-depth explanations of specific library materials) continuation of the English I instruction program was rated as a first priority, followed in importance by on-demand subject instruction for specific classes. Automated point-of-use and formal individualized instruction such as term paper consultations were also listed as appropriate vehicles for library instruction. One of the groups also identified reference desk service as a top priority and significant method of both orientation and library instruction.

Consideration of bibliographic instruction (formal course in bibliography) resulted in the recommendation by two of the groups that the possibility of offering a credit course in bibliography be pursued. One of the groups preferred an interdiciplinary course, while the other wanted to explore credit courses in subject and interdisciplinary bibliography as well as "house" courses and credit courses for freshmen. This same group also put forth the idea of non-credit courses. One group postulated that offering courses would necessitate a reallocation of human resources within the library system and the fostering of a working relationship with UFCAS and the executive committee of the graduate faculty.

The final question put before the groups concerns the timetable for implementation of selected features of a user education program. The question reads as follows:

> When. Consider and establish times for those several or few top ranked items which can be timetabled. For example, if media is to be used in English I, when? If a bibliography credit course is proposed when should it be ready to go to a curriculum committee? If a library instruction committee is to be appointed, when?

Two of the groups treated this question briefly. One placed the responsibility for the prompt implementation of an integrated user education program in the hands of the coordinator and committee whose appointment they had recommended. The other group quipped that the system-wide committee on user education should have been appointed "yesterday" and that media should have been integrated already into user education at Duke. Their final statement was that credit courses should not be initiated until more fundamental programs were well established.

Ilene Nelson, Chairperson
John Lubans, Jr.
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Library User Education
Annual Report
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Accomplishments:

The library user education program continues to reach more students each year with more effective teaching and materials. The continued growth of the program and its achievements are impressive but, when viewed in the context of the size of the library staff, they become remarkable. The program has received national prominence with few if any large institutions attempting to achieve the comprehensive nature of the OSU program. Key ingredients to the program's success are strong administrative support and a willingness on the part of library faculty to assume responsibility for educating students in addition to their traditional responsibilities.* The two excellent user education staff members have been very effective in developing new programs and supporting the library faculty and staff in their instruction activities.

We reached over 21,200 students this year with some form of library instruction related to academic assignments. This is an increase of 1,000 students over last year and 425 classes compared to 368 in the previous year. The number of LCS workshops increased from 39 to 50 reaching 2,526 library users compared to 2,023 the year before. Not included in these statistics are the special orientation sessions for international and graduate students, term paper clinics for continuing education students and discipline-related research clinics for graduate students which have been offered each quarter in the social sciences, arts and humanities, and natural and physical sciences.

* (Faculty rank is surely a factor in the commitment of library faculty to teach information skills for it is through faculty rank that librarians are recognized as teachers in their own right. Any change in that status will almost surely have an adverse impact on the program.)

A major breakthrough this year came in the freshman instruction program which is a part of the UVC 100 course. For the last seven years in this course, students have received library instruction which included an assignment requiring them to use the library system. Although we knew that the freshmen needed more instruction than they received in a single assignment, we had been unable to devise an additional library assignment that could be incorporated into the course. This year a second assignment (related to career information) was conceived and has been pilot-tested for two quarters. An amplification of the concepts and skills introduced in the first assignment, this has been so successful it will become a requirement in the course fall quarter. This accomplishment further strengthens the freshman library instruction program.

The User Education committee (newly formed in February 1984) generated a lot of activity: a new edition of the library newspaper, improvements in the LCS workshops and research clinics, examination of faculty colloquia, and adding instructional materials to displays in the main library lobby. The user education office participated in these activities and initiated other projects: programs to reach students through dormitory organizations and other campus groups and associations; integrating online searching into workshops; creating a library poster of campus celebrities; setting up a mailing program to deans and department chair; expanding the program to reach international, graduate, and transfer students and teaching associates. To improve the quality of our teaching for library faculty the office offered a workshop on effective teaching and counseled librarians on writing instructional goals and objectives and how to evaluate instruction. Measures to improve teaching will continue to receive special attention.

Recognizing that the library will never have enough staff to offer individual help whenever and wherever it is needed, emphasis on the development of instructional materials continues. The user education office is working with the office of University Publications in creating a standardized format for library instruction materials--this has been a long standing need.

Members of the office have brought attention to the program through professional activities at the state and national level including papers on the integration of personal research and user education, evaluating instructional programs, the faculty colloquia at Ohio State, and the development of the five year instruction plan/program. This fall a member of the office and a classroom professor will give a presentation on library user education and the OSU experience at the annual conference of the National Council of Teachers of English.

Needs:

Our greatest need last year was for an office for the user education staff, and we are very grateful that need has been fulfilled. We are also grateful that the head of the user education program no longer has dual responsibilities. As of January 1, 1985, the position is full-time user education with no responsibility for the undergraduate libraries. Our most pressing need now is for equipment that would enable the office to produce better looking materials in a more efficient manner.

Goals--Past and Future

Past:

We achieved in some measure all of the goals set last year--reaching more students with course-related instruction, offering more research clinics and better orientation programs, examining the faculty colloquia and planning future ones, developing a standardized format for materials, and sponsoring a teaching workshop for library faculty. One goal has not been met - the five year plan hasn't been finished.

Future:

Our goals for the year are much the same as last year's--to continue expanding the variety of user education activities enumerated above. Particular emphasis will be given to course-related instruction and increasing teaching effectiveness. The latter will be done by offering teaching workshops with more attention to writing goals and objectives and doing evaluation. All of the outreach programs will be developed further and the five year plan will be finished and adopted.

The coming year should see significant strides forward in the library user education program as the program moves consistently toward the goal of information literacy for all OSU students, a goal in conformity with the University's commitment to excellence.

Ohio State University

LIBRARY USER EDUCATION PLAN

OUTLINE OF THE PLAN

1. Identify and describe the academic community - people and programs;
2. Examine the library's resources - staff, collection, facilities and equipment, budget;
3. Establish goals and objectives for a comprehensive user education plan;
4. Summarize the library's current instructional activities with staff time involved -
   a. orientation programs,
   b. course-related classes,
   c. separate courses,
   d. point-of-use materials,
   e. handouts/guides,
   f. other;
5. Examine goals and objectives as prepared in light of the present program and identify unachieved goals and objectives;
6. Survey needs (as necessary) - user, program, resources;
7. Examine achieved goals and objectives in light of established needs and available resources; and
8. Establish priorities and set timetables.

User Awareness

Reach all potential users

Reach certain categories of users (as under orientation and b.i.)

A - Orientation

1 - Overarching

2 - All users

3 - Undergraduate students

4 - Graduate students

5 - Faculty and professional staff

6 - Continuing Education students

7 - International students

8 - University staff

9 - Library staff

B - Bibliographic Instruction

1 - Overarching

2 - All users

3 - Undergraduate students

4 - Graduate students

5 - Faculty and professional staff

6 - Continuing Education students

7 - International students

8 - University staff

9 - Library staff

Overarching Goals
Orientation

A. Goal - Users are familiar with the physical layout, policies, and procedures of the libraries relevant to their needs.

B. Goal - Users are aware that the library staff can help them feel comfortable in asking for assistance.

C. Goal - Users are aware of the basic library holdings records such as the card catalog and LCS, that will enable them to find materials in the system.

All Users
Orientation Goals

A. Goal - All users are able to locate key service points (e.g., circulation, reference desk, periodicals).

B. Goal - All users are familiar with the library procedures relevant to needs.

C. Goal - All users are familiar with the card catalog, LCS, and serial holdings.

Undergraduate Students
Orientation

(The following are ranked progressively for freshmen through senior.)
(Items marked with an * are covered in the Freshman Program.)

A. Goals:

1. Instructional Goal

Students are aware of the complexity of the library system and can identify and locate the individual libraries and major collections for their needs.

2. Program Goal

All students receive orientation to the system in their first quarter.

B. Objectives:

1. Instructional Objectives

T.a. Students are familiar with the physical layout of the two undergraduate libraries.*

E.1. Using a floor plan, students can locate key service points, the LCS terminals, reference materials, the card catalog, and the book stacks.*

T.b. Students can check out materials and know circulation rules.*

E.1. Students can identify where materials are checked out.*

E.2. Students can identify the loan period of the materials they are borrowing.*

E.3. Students can differentiate such library forms as overdue and recall notices and understand the consequences of not responding to them.*

T.c. Students can use the reserve materials efficiently.*

E.1. Students are able to check out reserve materials and understand the circulation rules.*

T.d. Students can find needed materials.*

E.1. Students are able to locate individual book titles in the reference department and the stacks.

E.2. Students are able to find individual journals in the serials department.*

T.e. Students are aware of the other libraries in the system and they know how and where to find out more about individual libraries.*

E.1. Students are able to locate other libraries in the system.*

E.2. Students can use LCS to find materials in other libraries.*

T.f. Students are familiar with the layouts and procedures of other libraries they need to use.

E.1. Using a floor plan, students can find their way around in other libraries.

E.2. Students can distinguish differences in procedures in other libraries.

T.g. Students can identify library staff and consult the appropriate staff member when necessary and feel comfortable in doing so.*

E.1. Students can identify the staff person to meet their needs, i.e., checking out materials, LCS instruction.

E.2. Students recognize that librarians have special knowledge and skills in finding information.*

E.3. Students do not hesitate to ask the appropriate person for help and feel comfortable in doing so.

T.h. Students are able to locate and utilize resources in the library system to meet their needs.*

E.1. Students recognize LCS as the on-line catalog.*

E.2. Students recognize that both LCS and the card catalog must be consulted for complete holdings.*

E.3. Students will be able to identify and use the libraries with the resources most relevant to their needs.

T.i. Students can identify sources that cannot be located through card catalogs or LCS.*

E.1. Students recognize that there are government documents which cannot be accessed through the card catalog or LCS.

E.2. Students are able to use the catalog in Special Materials to locate microforms.

E.3. Students can identify that there are materials in pamphlet files, the career center at the WCLRC, etc.

E.4. Students can identify special collections in the various libraries (i.e., corporate annual reports in the Commerce Library).

T.j. Students can identify computer based search services offered by the OSU Libraries.

E.1. Students recognize that the OSU Libraries offer computer based bibliographic services through several library departments (i.e., MIC, Main Reference, Health Sciences Library).

E.2. Students recognize that the OSU Libraries offer computer bibliographic search services on an individualized basis after the user has discussed his information needs in an interview with a librarian.

E.3. Students recognize that computer based services are offered as batch and online services.

a) Students can identify that batch services are run according to a production schedule, primarily through the Mechanized Information Center, and require a week wait before results are received.

b) Students can identify that online services are run on-demand by appointment.

E.4. Students recognize that computer based services can search retrospective and current materials.

a) Students can identify that retrospective services bring you up-to-date with information by searching a topic back in time

b) Students can identify that current awareness services keep you up-to-date by searching the new literature normally from month to month.

E.5. Students recognize that computer based services exist for all disciplines.

E.6. Students recognize that computer based services are offered for a fee.

a) Students can identify that batch services are offered for a flat fee and are subsidized by the OSU Libraries.

b) Students can identify that online services are offered at co

2. Program Objectives

a) By the end of the first quarter all freshman and transfer sophomore students receive library instruction through UVC 100 and have acquir the knowledge and skills identified in the plan with an asterisk.

b) By the end of their first year all freshman and transfer sophomore students have acquired the knowledge and skills identified in the pla and not covered in the Library Instruction Program (LIP).

c) By fall quarter, 1985, a program to reach all undergraduates not taking UVC 100 will be established; the program will have the same content as LIP.

C. Present Needs:

1. UVC Guidebook; videotape; maps; signs; self-guided tours; circulation procedures handouts; LCS brochures; list of special collections (not on LCS) for referral.

D. Future Needs:

1. Handouts for new program (under program objectives "c").

2. Videotape for new program.

Graduate Students
Orientation

A. Goals

1. Instructional Goal

All graduate students are able to utilize the library system on a basic level.

2. Program Goal

All graduate students will have received some form of orientation/ instruction by the end of their first quarter.

B. Objectives

1. Instructional Objectives (Terminal and Enabling)

T.a. Students are familiar with the physical location of the libraries within the library system.

E.1. Given a map, students can find any library within the system.

T.b. Students are familiar with LCS and the card catalogs.

E.1. Students can demonstrate that they know the Main Library card catalog and LCS are primary indexes to the library collections.

T.c. Students are aware of the circulation rules.

E.1. Students can check out and return materials within library rules and procedures.

T.d. Students are aware of library services, e.g., ILL, the user education program, MIC.

E.1. Students can identify where the ILL department is located and describe its function.

E.2. Students know about the library user education program and its application to their needs.

T.e. Students are aware of information relevant to their needs that is outside the library system.

E.1. Students can identify relevant information in other departments of the University, in private institutions (Chemical Abstracts, Battelle, OCLC), public offices, and other libraries.

T.f. Students know the libraries in their subject area.

E.1. Students are able to identify the library(ies) that will meet their needs.

E.2. Students are able to identify and reach the library specialists in their subject area.

2. Program Objectives

a) Library staff participates in Council of Graduate Students Orientation.

b) Schedule one orientation in each individual area each quarter (FWS).

c) Schedule a separate orientation program each quarter (FWS) for all international students following the Libraries' general orientation program.

d) Schedule a special orientation program each quarter for all T.A.'s covering:

1. User Education Program.

2. Search strategies.

3. Alternatives to a research paper.

4. Do's and don'ts in assigning paper.

5. Information on subject specialists.

e) Each library specialist contacts students in his/her subject area.

C. Present Needs:

1. Schedule a panel of presenters for council orientation.

2. Schedule staff to give orientation in individual areas.

3. Produce and revise as necessary handouts on:

a) OSU Libraries, MIC, Reference Department, LCS Circulation Policies, ILL, User Education Program, International Studies, Department Libraries, Special Materials.

b) Circulation rules and regulations.

c) Sources of information outside the library system.

4. Produce and revise as necessary:

a) List of libraries/areas with addresses and names of each head.

b) Map of library locations.

c) Libraries' newspaper.

d) LCS brochure.

e) Individual library guides.

D. Future Needs:

1. Produce a slide program for use in fall, 1984 presentation.

2. Produce a video program for use in individual areas by fall, 1986.

3. Contact all department chairmen with names of subject specialists.

4. Consider creation of an "Information Council of Columbus" that would facilitate information needs of all users.

Faculty and Professional Staff
Orientation

A. Goals:

1. Instructional Goal:

Faculty and professional staff are familiar with the library system.

2. Program Goal:

All new faculty and staff are to receive orientation to the library system by the end of their first quarter.

1. Instructional Objectives: (Terminal and Enabling)

T.a. Faculty and professional staff are aware of the organization, size, and distribution of the OSU library system.

E.1. Faculty and staff can utilize maps and library handouts to identify libraries, library locations, phone numbers, and hours.

T.b. Faculty and professional staff are familiar with circulation policies and procedures.

E.1. Faculty and professional staff can check out and return materials within the library's procedures and rules.

E.2. Faculty and professional staff understand the relevance and use of all relevant circulation materials.

T.c. Faculty and professional staff are aware of the library services that support their research and teaching needs and know the subject specialist in their discipline.

E.1. Faculty and professional staff can identify and locate the following services:

a. Location (Main Library and Health Sciences Library) and services offered by ILL. (Also, procedures to follow.)

b. Areas and access for each discipline's closed reserves.

c. Use of 422-3900 to learn both location and availability of material and for document delivery via campus mail.

d. Service and support possible through language bibliographies for material in Arabic, Slavic, Hebrew, Chinese, Japanese, Korean, Latin American, and other foreign languages.

e. Services and material through Center for Research Libraries.

f. Where borrowing privileges can be arranged for Big Ten universities, The University of Chicago, and certain Ohio university libraries.

T.d. Faculty and professional staff are aware of the b.i. progaram.

E.1. Faculty know how to initiate library instruction for their courses.

E.2. Faculty know the capabilities of library instruction.

E.3. Faculty know what instruction their students are receiving and can work with librarians to form realistic expectations concerning their students' knowledge and capabilities in using the library.

2. Program Objectives:

a. Offer orientation workshops each quarter.

b. Send a letter of introduction to the libraries to each new faculty member which contains: 1) the above listed sheets of information and 2) an invitation to a library orientation hour.

c. Give special orientation programs for new faculty and professional staff in which they are welcomed and given basic library information, as well as incentive (encouragement) to learn more, use more.

d. Make available in each library a floor plan of that library together with a brief listing (discussion?) of that library's major collection areas and services.

e. Have a pilot-test workshop for selected (at OSU 1-3 years) faculty and professional staff in fall, 1984.

f. Evaluate pilot program and rework problem areas, etc., in winter, 1985.

g. Pilot-test workshop for new faculty and professional staff in fall, 1985.

h. Evaluate pilot program for new faculty and professional staff in winter, 1986.

C. Present Needs:

1. Prepare information sheets which contain: 1) a campus map with all libraries prominently exhibited; 2) a list of hours when each library is open; 3) phone numbers for each library and public access office; 4) additional relevant information.

2. Prepare information sheets that cover: 1) the need for an up-to-date address on file, 2) circulation period, 3) where to return material, 4) what often does not circulate, 5) additional relevant information, 6) pink cards, 7) overdues, 8) saves, 9) recalls, fine charges, and payment, 10) additional relevant circulation matters, 11) faculty authorization cards.

3. Send letters to new faculty and staff members.

4. Design an orientation program that is self-instructional.

Continuing Education Students Orientation

A. Goals:

1. Instructional Goal:

All continuing education students are familiar with the library system.

2. Program Goal:

All continuing education students receive basic orientation information about the library system during their first quarter.

B. Objectives:

1. Instructional Objectives:

Same as undergraduate and graduate objectives depending on each student's level.

2. Program Objectives:

Same as undergraduate and graduate objectives depending on each student's level with the following special activites:

a. Term paper workshop offered each quarter

b. Handouts designed specifically for these students to be distributed through the Continuing Education office.

C. Present Needs:

1. Specially designed materials

D. Future Needs:

International Students
Orientation

A. Goals:

1. Instructional Goal:

Students are familiar with the library system and can identify some of the basic differences between libraries in their country and the OSU Libraries.

2. Program Goal:

By the end of their first quarter, students have received special orientation sessions.

B. Objectives:

1. Instructional Objectives:

Same as undergraduate and graduate student objectives depending on each student's level.

2. Program Objectives:

Same as undergraduate and graduate student objectives with the following special activities:

a. Orientation sessions for each large segment of students offered each quarter.

b. Special handouts designed to meet their special needs are distributed through orientation sessions and offices on campus.

C. Present Needs:

1. Handouts for special needs

2. Orientation sessions

D. Future Needs:

1. Videotapes

2. Self-guided tours

University Staff
Orientation and Bibliographic Instruction

A. Goals:

1. Instructional Goals:

Staff is familiar with the library system and can use basic library resources.

2. Program Goal:

Staff is able to meet their information needs using self-instructional materials

B. Objectives:

1. Instructional Objectives: (Terminal and Enabling)

T.a. Staff is aware of the organization, size, and distribution of the OSU library system.

E.1. Staff can utilize maps and library handouts to identify libraries, library locations, phone numbers, and hours.

T.b. Staff is familiar with circulation policies and procedures.

E.1. Staff can check out and return materials within the library's procedures and rules.

E.2. Staff understands the relevance and use of all relevant circulation materials.

T.c. Staff is aware of the library services that are relevant to their needs.

E.1. Staff can identify and locate the following services:

a. Location (Main Library and Health Sciences Library) and services offered by ILL. (Also, procedures to follow.)

b. Areas and access for each discipline's closed reserves.

c. Use of 422-3900 to learn both location and availability of material and for document delivery via campus mail.

T.d. Staff is able to use the LCS and the card catalog to find information.

E.1. Staff can identify what materials are not on LCS (newspapers, some documents, individual microform titles, etc.) and how and where to gain access to that material.

E.2. Staff is aware of the remote access possibility for LCS.

T.e. Staff is able to use standard reference materials and tools specific to individual needs.

2. Program Objectives:

a. Distribute to all departments basic information about the library and update and repeat distribution annually beginning fall quarter, 1984.

C. Present Needs:

1. Handouts

2. Memo for enclosing with materials

D. Future Needs:

Overarching Goals
Bibliographic Instruction

A. Goal - Users are able to make effective use of library collections, services, and staff.

B. Goal - Users are able to achieve substantial independence in using library resources.

Undergraduate Students
Bibliographic Instruction

(The following are ranked progressively for freshman through senior.)
(Items marked with an * are covered in the Freshman Program.)

A. Goals:

1. Instructional Goal

Students are able to utilize library resources efficiently and effectively to meet their information needs.

2. Program Goal

Course-related instruction at all levels and in all departments, workshops, and handouts make students good users of information by the time they graduate.

B. Objectives:

1. Instructional

T.a. Students are able to make effective use of general and special encyclopedias* and to find unfamiliar encyclopedias using the card catalog and LCS.

E.1. Students are able to select the most appropriate general encyclopedia for their needs and use the index to find information.

E.2. Students are able to select the most appropriate special encyclopedia and use the index efficiently. A student will be able to locate a general introduction and at least two references to further information on a specific topic.*

E.3. Students are able to use bibliographies from encyclopedia articles in their search.*

E.4. Students use LCS and the card catalog to identify unfamiliar encyclopedias.

T.b. Students are able to use the card catalog and LCS to locate material by author, title, and subject using the Library of Congress Subject Headings. They can identify and use the information on catalog cards and LCS terminals* and can identify and use tracings and cross references.

E.1. Students can locate specific titles by author and title on LCS and the card catalog.*

E.2. Students are able to use LCSH to identify appropriate subject headings, see, and see also references.*

E.3. Students can use the LCSH to locate books by subject on LCS and the card catalog.*

E.4. Students are able to read and identify the information on a catalog card and LCS screen including the author, title, place of publication, publisher, date of publication, series title, bibliographic notes, tracings, and call number.*

E.5. Students recognize the importance of the complete call number and how to find books by call number.*

E.6. Students can use tracings to do additional subject searching of LCS and the card catalog.

E.7. Students can use the see and see also references in LCS and the card catalog efficiently.*

T.c. Students are able to identify and use the most appropriate periodical indexes for their needs and interpret the citations. Students can use LCS to locate journals.*

E.1. Student are able to select the most appropriate periodical index for their topics from such indexes as Readers' Guide, Social Sciences Index, Humanities Index, Applied Science and Technology, General Science Index, Public Affairs Information Service, and Essay and General Literature.*

E.2. Students can identify access points for searching indexes (i.e., subject, key word, title, author).*

E.3. Students can identify the parts of the citations including title of article; title of journal, volume, date, author, and page numbers.*

E.4. Students are able to locate needed journals on LCS.*

T.d. Students who have completed the freshman program will recognize the UVC Guidebook as a resource for identifying Library research materials.*

E.1. Students will be able to identify specific reference titles to meet their research needs.*

T.e. Students in the Freshman Program receive a hands-on introduction to LCS.*

E.1. Students completing the Basic Level Exercise are able to follow step-by-step instructions and successfully complete a book ATS/ search and a serial TLS/ search.*

E.2. Students completing the Advanced Level Exercise are able to use the LCS brochure or the LCS instructions in the UVC Guidebook and successfully complete a book ATS/ search, a serial TLS/ search and a SUB/ search.*

T.f. After completing the freshman program library exercise, students will feel comfortable approaching an LCS terminal and instructing themselves in its use.*

E.1. Students will be able to use the LCS brochure or the LCS instructions in the UVC Guidebook and teach themselves ATS/, TLS/, and SUB/ searches.*

a) Students will be able to perform book ATS/ and TLS/ searches after 30 minutes of practice.*

b) Students will be able to perform serial TLS/ searches with volume and/or year limiters after 30 minutes practice.*

c) Students will be able to perform SUB/ searches after 30 minutes of practice.*

T.g. Students recognize the need to make regular use of LCS to maintain their searching skills.

T.h. Students are familiar with how books are classified (LC and Dewey) and how they are shelved in the library system.

E.1. Students can identify the library's classification system and the general classification of their subject area.

E.2. Students are able to browse the collection in specific subject areas either using LCS or physically going to the shelves.

T.i. Students are able to transfer acquired research skills to a new research problem.

E.1. Given an assignment, students can identify its similarities to previous assignments/research and begin to research the topic.

T.j. Students are able to use efficiently course-related handouts prepared by librarians.

E.1. Students are able to work in an independent and self-sufficient manner as they begin their research.

E.2. Students will seek a librarian's assistance when they encounter unusual or difficult research problems.

T.k. Students are able to plan and implement an efficient search strategy.

E.1. Students who have completed the freshman program will recognize the concept of search strategy and be able to implement a basic search strategy.

E.2. Students are able to establish an efficient order of using materials, moving from the general to the specific using current and retrospective and all types of relevant materials.

E.3. Experienced students will be able to identify the major subtopics in a complex topic in their field.

E.4. Experienced students can identify whether the sources required in the subtopic are primary and/or secondary and describe their general nature.

E.5. Experienced students can identify the most probable types of reference tools to locate the relevant sources for each subtopic.

E.6. Experienced students can identify the most relevant collections - library and/or non-library for their topic.

E.7. Experienced students can identify alternative ways of finding materials, if necessary.

T.l. Students are able to evaluate materials and select those most appropriate to their needs.

E.1. Given a topic in their field, students will be able to compile a quality bibliography within a specified period of time, using an efficient search strategy.

T.m. Students can identify such reference sources as bibliographic, biographical, and newspaper indexes, government documents, reviews, books of statistics, and almanacs.

E.1. Students can use bibliographies like Gates' Guide to the Use of Books and Libraries and Winchell's Guide to Reference Books to find reference works on unknown topics.

E.2. Students are able to select the most appropriate biographical index or dictionary for their needs and to find the material indexed.

E.3. Students can identify major newspaper indexes such as New York Times Index and can identify the parts of the citations.

E.4. Students are able to locate government documents by using the CIS Index and the Monthly Catalog.

E.5. Students are able to use book review indexes to locate reviews on specific titles.

E.6. Students are able to use such books of statistics as Statistical Abstract of the United States, World Almanac, and Information Please Almanac.

T.n. Students demonstrate an understanding of how information is organized in their fields and the ability to use related basic reference tools, including guides to the literature.

E.1. Students will identify the major channels of scholarly communication in their fields and the formats used in the literature.

E.2. Students will list the type of reference tool which controls each format of the literature in their fields.

E.3. Students can identify from a list of different types of reference tools at least one title of each type in their fields.

E.4. Students, when given the list, can specify the type of information found in each of the ten key reference books in their field.

E.5. Given a sample entry from each of the ten key reference books, students can correctly identify the parts of each citation.

E.6. Using appropriate indexes, students will be able to identify at least one journal article on prominent people and topics in their field.

T.o. Students recognize that computer based services are used to supplement and enrich manual searching of indexes and abstracts.

E.1. Students recognize that computer based bibliographic services primarily search indexes and abstracts in a database.

E.2. Students can identify the difference between a search of LCS, OCLC, and a search of other computerized databases.

E.3. Students recognize that many indexes and abstracts are available in both print and machine readable form, but some exist only in machine readable form and therefore must be searched with a computer.

E.4. Students can identify that computer based services offer advantages over manual searching including:
  a. more approaches to searching i.e., subject, title, identifier, abstracts, etc.
  b. faster, more efficient, thorough, and current.

T.p. Students recognize that computer based literature searching is a logical element of the library search strategy.*

E.1. Student recognize that computer based searching is a systematic and specialized way of doing a literature search.

E.2. Students recognize that computer based searching requires that the user define his research need or information needs as concisely and thoroughly as possible so it can be reformulated into a systematic search using computer logic.

T.q. Students recognize that computer based searching is normally done for them through an intermediary, or librarian, known as an information specialist or search analyst.

E.1. Students recognize that computer based searching is individualized, designed to meet the user's individualized need for information.

E.2. Students recognize that computer based searching normally requires an interview in which the information specialist consults with the user to help him define the information needed.

E.3. Students recognize that the information request is reformulated into a systematic search using computer logic, and that it is designed to search out logical relationships in the database.

T.r. Students recognize that computer based searching is primarily used to do concept searching, to search out logical relationships in the database through the use of computer logic.

E.1. Students can differentiate the use of computer logics: "AND" logic, "OR" logic, "NOT" logic.

T.s. Students recognize that computer searching is used as an adjunct to reference services.

E.1. Students can identify the use of databased searching to answer ready reference questions, such as bibliographic verification, identifying new terminology not yet used in printed sources, locating directory, dictionary, or encyclopedia types of information, locating review, etc.

E.2. Students can identify the use of computer based searching to get at in-depth subject searches, which is not possible in a manual search of an index, so that a comprehensive and retrospective bibliography can be printed for the user on an individualized basis.

2. Program Objectives:

a) LIP continues to reach all freshman and transfer sophomore students with the knowledge and skills identified with an asterisk in the plan.

b) By fall, 1985 a program will teach all undergraduates not reached by LIP the knowledge and skills covered in the freshman program.

c) By fall, 1986 all instructional objectives not covered in the LIP will be taught through course-related instruction; the user education office will coordinate this objective.

C. Present Needs:

1. Materials - search strategy, handouts, lectures

2. Evaluation - a) assessment of the quality of student papers, bibliographies, and presentations.

b) observation of librarians and staff.

D. Future Needs:

1. Videotape

Graduate Students
Bibliographic Instruction

A. Goals

1. Instructional Goal:

Graduate students are able to use the library system efficiently and effectively.

2. Program Goal:

Through a variety of approaches, graduate students are to receive advanced course-related instruction by the end of their first year.

B. Objectives

1. Instructional Objectives: (Terminal and Enabling)

T.a. Students are able to use LCS and the card catalog to find the information they need.

E.1. Students demonstrate the ability to do all types of searching on LCS and in the card catalog and understand the information on the screen display and catalog cards.

E.2. Students can identify the correct subject headings for their topics in LCSH and apply the information to efficient subject searching in LCS and card catalog.

E.3. Students demonstrate the ability to use cross references and tracings in LCS and card catalog.

T.b. Students are familiar with reference sources at the graduate level.

E.1. Students can identify and locate such general reference sources for researching at the graduate level as Dissertation Abstracts International, NUC, OCLC.

E.2. Students can identify and use the specialized reference sources for their subject area.

T.c. Students use the search strategy concept in meeting their information needs.

E.1. Students can develop a complex search strategy in their subject areas.

E.2. Students can develop an efficient search strategy outside their subject areas.

E.3. Students can use an efficient search strategy to keep current in their fields.

2. Program Objectives:

a) Offer at least one workshop on new and/or special tools such as SSCL each quarter.

b) Increase general and specialized course-related bibliographic instruction by 20% each year.

c) Develop research and subject guides which are uniform in format in each individual library/area reaching 5 or more libraries annually.

d) Offer broad discipline related Graduate Students Research Strategies Clinic at least three times each quarter (FWS).

e) Idenfity research method courses offered and faculty who teach them by fall, 1984.

f) Contact and work with at least one faculty member who teaches a graduate course by fall, 1984.

g) Offer at least one new course-related bibliographic instruction session every quarter (FWS).

h) Develop a credit course in bibliographic instruction using a team-teaching approach with Main Library Reference librarians and subject specialists by 1989.

i) LCS workshops: Offer at least 5 general workshops each quarter and at least one scheduled LCS lecture in every individual area each quarter (FWS).

C. Present Needs:

1. Research strategies for each individual area.

2. MIC information.

3. List of subject research people.

4. LCS Brochures.

5. Transparencies.

D. Future Needs:

Computer program by 1986.

Faculty and Professional Staff
Bibliographic Instruction

A. Goals:

1. Instructional Goal:

Faculty and professional staff are able to use the library system efficiently and effectively.

2. Program Goal:

All faculty and professional staff members receive adequate instruction to enable them to use the library system efficiently and effectively.

B. Objectives:

1. Instructional Objectives:

T.a. Faculty and professional staff demonstrate that they are knowledgeable about the library's collection in their subject area and are able to use the collection efficiently.

E.1. Faculty and professional staff are able to identify the strengths and limitations of the libraries' Collections in terms of their research projects and teaching assignments.

E.2. Faculty and professional staff are aware of the special collections within collections (e.g., Landmarks of Science) in their fields.

E.3. Faculty and professional staff participate in the development of the collection in their subject areas. In accomplishing this, they know with whom to consult in individual libraries, department library committees, and in the library Acquisition Department; and they understand the portions of the approval plan profile relevant to their research areas.

T.b. Faculty and professional staff are able to use LCS and the card catalogs to find information.

E.1. Faculty and professional staff identify what materials are not on LCS (newspaper, some documents, individual microform titles, etc.) and how and where to gain access to that material.

E.2. Faculty and professional staff are aware of the remote access possibility for LCS.

E.3. Faculty and professional staff can use alternative forms of access to collections, including:

a) Search-helper, b) OCLC, c) NUC, d) ULS, e) Online bibliographic services in MIC and the Health Sciences Library.

T.c. Faculty and professional staff are able to use standard reference materials and tools specific to individual research needs.

E.1. Faculty and professional staff create and use basic bibliographics, citation indexes, government documents, etc.

E.2. Faculty and professional staff use a source that is central to their basic needs and are informed of new important materials when they are acquired.

E.3. Faculty and professional staff use online searching whenever it is feasible and advisable.

2. Program Objectives:

a. Faculty members receive information on the size and scope of the library's collection in their research area in handouts.

b. Individual consultations are scheduled with library faculty.

c. Workshops are offered on special collections, tools, etc.

C. Present Needs:

1. Whole range of handouts

2. Workshops

D. Future Needs:

Continuing Education Students
Bibliographic Instruction

A. Goals:

1. Instructional Goal:

All continuing education students are able to use the library system efficiently and effectively.

2. Program Goal:

All continuing education students receive adequate instruction at the time that they need it to achieve the instructional goal.

B. Objectives:

1. Instructional Objectives:

Same as undergraduate and graduate students objectives depending on each student's level.

2. Program Objectives:

Same as undergraduate students objectives depending on each student's level with the following special activities:

a. Self instructional materials at different levels.

C. Present Needs:

1. Programmed instruction workbook

D. Future Needs:

International Students
Bibliographic Instruction

A. Goals:

1. Instructional Goal:

All international students are able to use the library system efficiently and effectively.

2. Program Goal:

All international students receive adequate instruction at the time they need it to achieve the instructional goal.

B. Objectives:

1. Instructional Objective:

Same as undergraduate and graduate student objectives depending on each student's level.

2. Program Objectives:

Same as undergraduate students objectives depending on each student's level, with the following special activities:

a) Each library area provides handouts for special needs.

b) Each subject specialist provides special instructions and/or handouts as needed.

C. Present Needs:

1. Handouts

2. Special sessions

D. Future Needs:

1. Completely integrated program with appropriate offices.

Ohio State University

Subject Committee for Library User Education and Communication

Date November 21, 1983 WJS

From William J. Studer, Director of Libraries

To Virginia Tiefel
Eleanor Block

I am herewith appointing you as co-chairpersons of the above-named Committee (Virginia Tiefel, ex officio; Eleanor Block for two years, Jan. 1, 1984 - Dec. 31, 1985). The following are also hereby appointed for the terms noted:

Jan. 1, 1984 - Dec. 31, 1984

Pam Bradigan
Mary Jo Arnold
Lorri Ramey

Jan. 1, 1984 -- Dec. 31, 1985

Rai Goerler
Rosanna O'Neil

Jan. 1, 1984 - Dec. 31, 1986

Susan Kroll
Nancy Schregardus
Susan Wyngaard

Ex Officio

Sally Simms
Susan Logan
Anne LaPidus

The committee's responsibilities are to provide advice and support in definition and development of instructional offerings and various communications of the University Libraries. Specific responsibilities of members will be to assist in planning and evaluation of such offerings; development and production of print/non-print materials; participation in lectures, colloquia and workshops; and gathering/distributing information for/from such sources as the OSU Poll and user suggestion boxes.

The committee is authorized to create subcommittees, as needed, each subcommittee to be chaired by a member of the committee proper.

I believe that all understand from our faculty meeting deliberations and preliminary discussions with Virginia Tiefel that this is a committee pivotally essential to the success of the library user education program and to our various communication efforts aimed at our several user constituencies.

I deeply appreciate everyone's willingness to serve.

OMS
Systems and Procedures Exchange Center

Public Service Study Task Force Reports

INTRODUCTION AND METHODOLOGY OF THE TASK FORCE

The Task Force on Library Instruction was charged with the responsibility of examining current library instruction programs and planning of future efforts in this area. Task Force work was to include, but not necessarily be limited to the following concerns: (1) objective(s) of library instruction programs; (2) the effectiveness of these programs in meeting their objectives; (3) the desirability or undesirability of centrally coordinated services; (4) the utilization of available hardware and software for library instruction; and (5) appropriate staffing configurations for library instruction.

One of the challenges faced by the Library Instruction Task Force was deciding what was meant by the term "library instruction" at MSU. After considerable discussion and listing of library instruction activities in the Libraries, the group settled on the following definition:

TASK FORCE WORKING DEFINITION OF LIBRARY INSTRUCTION

The primary objectives of the library instruction programs in the MSU libraries are (1) to provide basic orientation to the library facility including an explanation of major service points in the library and (2) to increase the awareness, on the part of the library user, of the resources and information available in the library. Additionally, the library instruction programs should enable patrons to make effective use of library resources by providing instruction for basic finding tools (e.g. card catalog, CLSI, SHL, etc.); by familiarizing the user with the research process, either generally or for a specific subject; by keeping long-time users aware of physical changes in the library and of technological innovations, new resources, etc.

The Task Force is defining "library instruction" programs as those instructional activities which are, for the most part, pre-scheduled or self-paced (either by individual librarians or as regularly-scheduled "walk-ins", seminars, the library workbook, etc.), structured (i.e. setting out to teach specific objectives) and which involve direct interaction between librarians and patrons. For the purposes of the Task Force work "library instruction" does not include the one-to-one instructional interactions which are integral to the assistance provided at the Information and reference desks, and which appear to comprise the majority of branch library instruction endeavors.

The following on-going library instruction programs have been identified in the MSU Libraries as falling within the scope of our working definition: class specific tours; Law materials walk-in tours; CLSI and OCLC walk-in tours; Welcome Week; Library Seminar series; classroom lectures; American Thought and Language (ATL) Workbook; ATL 117 (Use of Libraries).

> The Task Force recognizes that other activities of an instructional nature are carried out in the library which have not been included in the working definition. These include, among others: University Libraries publication; newsletters; SDI services; bibliographies; current awareness services; publication of handouts*. These activities fall outside the scope of the definition as they do not involve a direct interaction between a librarian and a patron, and many of the activities appear to serve primarily a "public relations" function for the Libraries.

In addition to establishing a "working definition," the group arrived at the following philosophy of library instruction:

> (1) The very most effective library instruction is that provided to students at the point in time at which they must use the library and library resources to answer an information need.
> (2) As many students as possible should be reached through library instruction programs, but only through programs consistent with #1 above.
> (3) Time and energy should not be devoted to library instruction programs which, attempting to reach large proportions of the undergraduate population, are primarily orientation sessions unrelated to an immediate information need of the students.

These tenets proved to be instrumental in guiding the deliberations and in providing the framework for the final recommendations for a program of library instruction at MSU.

The first task of the group was to determine an Action Plan. The Task Force identified four areas to be examined in the course of its work: (1) objectives of library instruction; (2) alternative programs and technologies; (3) staffing for library instruction; and (4) evaluation of MSU library instruction activities. The Action Plan specified, for each of the four areas, the information needed: the methodology to be used to gather the required information; work assignments for each Task Force member; and regular deadlines. The nature of the considerations and the order in which they were approached provided an effective and even flow to the group's work, as each area of study grew logically from the previous area.

A review of the literature provided the basis for much of the Task Force deliberations (see Bibliography, Appendix C). Reading of the success or failure of programs at other institutions helped the group to determine if an alternative program idea could be effective in the MSU Libraries; the literature provided guidelines for writing goals and objectives for library instruction programs; and it pointed out that

*Although outside the scope of its definition, the Task Force recommends that further study be done on the effectiveness of MSU Libraries handouts and signs.

much work remains to be done in the profession in providing substantive literature on the evaluation of library instruction. In addition to the thorough literature survey completed by a Task Force member, LOEX (Library Orientation Exchange, Eastern Michigan University, Ypsilanti, MI) responded to a request for materials relating to the four areas of study.

Interviewing key library administrators, unit heads and also librarians directly involved in library instruction was an effective way to get a sense of the priority given to library instruction activities in the MSU Libraries and to hear the concerns of librarians regarding the current ad hoc nature of instruction in the Libraries. The interviews had four major areas of emphasis: (1) to determine the goals and objectives of current instructional activities as perceived by the staff; (2) to query the administration and staff regarding current and/or optimal staffing patterns for library instruction; (3) to determine the level of need for support services or resources for library instruction; and (4) to determine if there is a need for staff development for librarians providing instruction.

To prepare for and assist in making final recommendations concerning both current library instruction programs and alternative programs and technologies, the Task Force utilized the ARL's Office of Management Studies methodology of comparing the impact of the particular program with the feasibility of providing the program. For each current and alternative program discussed, the Task Force determined the following: the number of people reached; staff preparation time; the length of the presentation; the cost of the program (excluding the costs of staff time); equipment needed; space required; other resource people needed; the ease of evaluating the program; where the responsibility for the program lies within the administrative framework; and whether the program is primarily orientation, basic library instruction, walk-in instruction or subject-oriented instruction. This approach provided a consistent basis for comparison among the programs and encouraged the group to make objective and well-founded decisions.

A review of library instruction currently offered by the Libraries was the first step in developing a well-rounded program of library instruction at MSU. Interviews with administrators and librarians presented the Task Force with two prevailing attitudes: first, that the MSU Libraries currently make available an extensive range of library instruction activities and that, for the most part, the instruction has been well-presented and well-received; but secondly, that the tendency has been to continue to add new programs without ever retracting old or ineffective ones. In accordance with the group's definition of library instruction, the following current activities were evaluated as to their impact and feasibility: Welcome Week; the ATL Workbook; ATL 117 (Use of Libraries); CLSI and OCLC walk-in tours; general library walk-in tours; law materials walk-in tours; course-integrated lectures and tours; and the library seminar series. For Task Force suggestions regarding the retention or discontinuation of each program, see "Recommendations on Current Library Instruction Programs."

Alternative programs and technologies reviewed by the Task Force were derived primarily from the literature (see the Bibliography, Alternative Program section, Appendix C) and from the group's knowledge of and interest in instructional activities in place at other institutions. Consideration was given to the impact and feasibility criteria mentioned above, as well as to how the program would augment existing instruction, the viability of the program in light of the Libraries' milieu and clientele, and whether specific computer-assisted instructional programs would be compatible with the Libraries' recent hardware expenditures and with the networking capabilities of the University system. Alternative programs and technologies evaluated by the Task Force included: printed self-guided tours; slide/tape presentations; audiotape programs; an alteration of the current Welcome Week program; subject-oriented workbooks; instruction utilizing videotape or television; computer-assisted instruction including the use of CLSI for information display; and several programs of extensive course-integrated instruction. For Task Force suggestions regarding these programs, see "Recommendations on Alternative Library Programs."

One of the charges facing the Task Force was to determine objectives for library instruction. Up to this time, statements of goals and objectives have not existed for the majority of instructional programs in the Libraries. Although one might assume that each library instructor has unwritten goals and objectives in mind when preparing for instruction, the Task Force felt that writing goals and objectives for current and recommended alternative programs would serve a two-fold purpose: (1) that it would document the intent of each program in order that all participants might have a common understanding of the expectations of the program, and (2) to form the basis for evaluations of the program. Goals and objectives for current library instruction programs (see Appendix A) were based on existing statements of objectives and on the group's understanding of the intent of each program. Goals and objectives for alternative program recommendations (see Appendix B) represent the Task Force definition of and objectives for each program.

Considerations regarding staffing configurations for library instruction were prevalent throughout the course of Task Force deliberations. Interviews with librarians involved in instruction indicated that a high level of frustration exists regarding the current approach to staffing for instruction activities in the Libraries. Primary concerns include the lack of set priorities to guide the Libraries' commitment to instruction; lack of adequate planning and preparation time due to the perceived low priority of instuction in the continuum of public service responsibilities; lack of adequate support services to assist in preparing and revising instructional materials; duplication of effort which exists due to decentralized files and poor communication; and lack of sound evaluation tools to provide constructive criticism for the library instructor and to measure the overall effectiveness of each program. It is the recommendation of the Task Force that a full time position should be developed for a centralized Coordinator for Library Instruction at MSU. It is felt that this would provide for the most efficient use of staff, resources and support services. In addition, having a single Coordinator take responsibility for all library instruction activities would insure a commitment to a well-defined overall program of library instruction at MSU, thus moving away from the ad hoc nature

of instruction as it currently exists in the Libraries. For Task Force suggestions regarding staffing concerns, see "Recommendations on Staffing for Library Instruction."

The Task Force was unable to meet all the goals regarding the evaluation of library instruction programs as set forth in the Action Plan. The group had planned originally to enlist the services of a consultant to assist in developing actual evaluation instruments to be administered with each instructional program. One impediment to completing this goal was the lack of substantive literature regarding the evaluation of library instruction programs. Everyone recognizes that evaluation is a crucial component of any library instruction activity, but there are few guidelines to assist in creating instruments which are reliable, objective and which will provide constructive criticism regarding the value of the program. In addition, the group realized that means of evaluation could not be developed until after goals and objectives were written for each program. Now that these goals and objectives exist, the Library may proceed with enlisting the services of a consultant to write evaluation instruments. An inventory was made of evaluations currently being used with MSU library instruction activities (see "Evaluation of Library Instruction Programs"). It suggests that much of the evaluation currently done in the Libraries solicits subjective responses from the users, that the evaluations tend not to critique specific elements of the instruction, and that they cannot be used to measure the retention value of the instruction. It is the strong recommendation of the Task Force that further work be done in creating reliable evaluation instruments in order to ensure the continuing quality and cohesiveness of the library instruction program at MSU.

In an effort to address the range of user needs for instruction, the Task Force developed an overall, graduated program of library instruction. The program consists of four levels of instruction: (1) library orientation, to provide a general introduction to the physical layout of the library and an overview of essential library services and policies; (2) basic library instruction, to make students aware of library services and to enable them to use basic library resources effectively and efficiently to obtain materials to meet an information need; (3) walk-in instruction, to provide instruction at a level of intensity unable to be provided in typical reference interactions; and (4) subject-oriented library instruction in which extensive instruction in the use of the library and/or library resources is provided, with the intent of developing independent, knowledgeable and confident library users. Recommendations on current programs and on alternative programs and technologies support the concept of a graduated program in library instruction for MSU, and reflect the group's philosophy of instruction. Thus library orientation sessions, at the low point in the continuum of effective library instruction, involve little or no staff presentation time and are primarily aimed at the motivated or interested library user; while subject-oriented library instruction, seen as the most effective form of instruction, involves far-reaching and well-planned programs, and considerable administrative and staff support. The Task Force's proposed program for library instuction at MSU includes the following programs: (1) library orientation: Welcome Week (as an alteration of the existing program), a printed self-guide tour and a self-operating slide-tape program to be available on demand; (2) basic library instruction: subject-oriented workbooks; (3) walk-in tours: general library walk-in tours and law walk-in tours; and (4) subject-oriented instruction: the Library seminar series and course-integrated instruction. It is hoped that the strengths of a well-rounded program of this nature will be considered and that the recommendations of the Task Force be accepted *in toto*.

("It is a generally accepted truism these days that participation in decision-making increases the commitment of staff to proposed changes. Also, in this Library, the staff is of an unusually high caliber and shows considerable dedication in the performance of their duties. For these reasons, the Task Force thinks that every effort should be made to solicit ideas and suggestions for improvement of public services from all levels of staff." ORGANIZATION, p. 46)

RECOMMENDATION 20. In its initial phase, the Public Services Committee be charged with addressing the following specific issues and concerns:

* the development of a new Library Guide or series of individual brochures on departments and services;

  ("One primary need identified by the subgroup is an overall guide or series of brochures to library services and departments, special collections, and departmental libraries." USER NEEDS, p. 67; ORGANIZATION, p. 48; and DEPARTMENT HEADS MEETING, July 17, 1984)

* the Information Desk, its continuance, dissolution, or transformation into a Catalog Information Desk. The Committee will need to work closely with the Task Force on the Introduction of BIS on this matter;

  (Whatever form the Information Desk takes, if it is continued, an important priority should be investigating ways to ensure a more uniform quality in staffing. ORGANIZATION, pp. 77-79)

* the continued development of a program for combatting noise in Davis Library, taking into account related efforts made by the Undergraduate Library staff;

  ("Respondents left little doubt that they are sensitive to library environments...All three groups complained about noise in Davis...Open architecture, concentrated use, and user attitudes all seem to be contributing factors to the perception of noise." USER NEEDS, pp. 51-52)

* the improvement of the public services training and referral processes.

  (See subsequent sections on Staff Development and Training and Referrals for further discussion of this matter. THE STUDY TEAM)

RECOMMENDATION 21. After the preceding issues have been addressed, the Public Services Committee organize itself in an appropriate and effective manner to deal with bibliographic instruction and the promotion of public services in the following ways:

* by conducting a careful review of the Library's current bibliographic instruction program, including library tours, to determine whether the Library is offering the appropriate kind and level of services needed in this area and to follow up with recommendations for necessary program changes or additions. User Needs Recommendations 14, 21-26, 51D, and 126 and Organization - Bibliographic Instruction Suggestions 1-3 should be considered;

  ("It appears that a small group to work out reporting techniques, planning, and problems as they develop or overlap would be very beneficial." ORGANIZATION, pp. 21-25)

* and by serving a coordinating role for all aspects of the Library's publicity and promotion program. The group will need to investigate the establishment of a budget for production of publicity materials, so that the expenditure of funds can be monitored to reflect a coordination of needs and a support for priority items. Recommendations presented on pp. 61-69 of the User Needs Task Force report should be considered.

  (Promotion of library services has been identified as an area that needs coordination and direction. In the past, individual departments and services have independently produced brochures, handouts, etc. to promote services, yet there has been very little coordination of effort. Now that services are being provided in the new environment of Davis Library, the time to promote these services more effectively is opportune.

  The user survey underscores the need for improved publicity as users in all three categories: faculty, graduate students, and undergraduates, exhibited a lack of awareness and familiarity with a number of library services. The three other Task Forces also supported the need for an improved publicity program. THE STUDY TEAM)

Computer Search Services Committee

THE STUDY TEAM RECOMMENDS THAT:

RECOMMENDATION 22. The Computer Search Services Committee continue to serve as the coordinating unit for online searching in the Academic Affairs Library with responsibility for recommending budgetary and policy making priorities to the Library Administration through the Associate University Librarian for Public Services. As noted previously, communication with the Public Services Committee would be enhanced by some official affiliation with that group.

("The committee framework would provide an avenue for coordination and centralization of policy, procedures, and budgeting functions, yet not sacrifice flexibility, variety of input, or shared ownership in conjunction with autonomy." ORGANIZATION, p. 33)

BIBLIOGRAPHIC INSTRUCTION

81. The Assistant University Librarian for Public Services and Collection Development, and other Public Services staff should begin to distinguish between and respond to the two separate kinds of instruction needs of the Brown University academic community. The two kinds of instruction are: basic library orientation (i.e., what are the services and how to use them) and research instruction (i.e. what are the Library's resources and how to use them). Both kinds of instruction are needed. The current bibliographic instruction program should be examined to include the needs of the inexperienced user and specific discipline topics. Orientation services should include basic information (circulation rules, recalls, missing book searches, etc.) A program of instruction, both services and resources, should be developed for the Special Collections.

Public Services Staff
/Ongoing

82. Instruction sessions should be arranged for individuals and small groups of graduate students tailored to individual needs. Departmental Library Representatives might be used to encourage students to make appointments with subject librarians. Research Instruction packages should become subject specific and include Collection Development, special resources, ILL, etc. Information on these packages should be included in packet sent initially to all faculty and graduate students, then to new faculty and Department Library Representatives at the beginning of every academic year.

Reference Department
/Within 3 months

83. The appropriate Public Services units must take responsibility for educating users by preparing instruction packages and promoting their use to all populations. The Library should increase its publicity of the availability of Library instruction services. Increased staff participation in creating these packages should be encouraged. Department Heads whose areas are to be covered in the preparation of these packages, should recognize the activity as essential to maintaining the quality Public Services by allocating time for planning and actual preparation.

Public Services Staff
/Ongoing

84. The Library should study the effectiveness of existing modes of communication and develop alternatives, such as: library services package cassette tapes available for use with student's own Walkman or other tape player; video or slide-tape presentations for group presentations regarding Library services; cassette tapes in foreign language for our international students; appropriate audio visuals available commercially with consideration for purchase or development of similar packages. The Reference Department should develop request forms and evaluations for both kinds of instruction (services and resources).

Head of Reference
/Within 2 years

85. The Library should consider the purchase of equipment necessary to produce audio visual materials for use in instruction and/or investigate what the Media Center has to offer in the way of audiovisuals and equipment.

Head of Reference
/Within 2 years

86. The Library should investigate the needs of the international students and faculty on campus regarding ihstruction in Library services and resources.

Head of Reference
/Within 6 months

87. The Assistant University Librarian for Public Services and Collection development, with the Head of Reference, should investigate the possibility of coordinating Library resource instruction with the Writing Center for term-paper assistance.

Head of Reference
/Within 6 months

88. The variety of instruction available in the Library should be included in publicity articles written by the Assistant University Librarian for Public Services and Collection Development and other Library Staff.

Public Services Staff
/Ongoing

89. The University Librarian and appropriate Assistant University Librarians should consider a program of seminar-building on topics needed by users (i.e. techniques of Library research with special sub-units on Government Documents, Special Collections, and other discipline-specific topics) and then submit these proposals to Educational Policy Committee for consideration as a course much the same as a Modes of Thought or University Forum course. The Department of Bibliography should be involved in this planning.

Library Administration
/Within 2 years

NON-PRINT/AUDIOVISUAL MATERIALS

Audiovisual materials include materials in audio and visual formats which convey information primarily by sound and image rather than by text, e.g., charts, graphs maps, pictures, slides, filmstrips, audiorecordings, videotapes, motion pictures, and models. Materials of particular concern are those that require the use of special equipment in order to be seen or heard.

Non-print or non-book materials include machine-readable data files or bodies of information coded by methods that require the use of a machine, typically a computer for processing, e.g. files stored on magnetic tape, punched cards, disks, etc.

At the present time, the Library is not systematically purchasing audiovisual materials, largely because of a lack of facilities for storing, circulating, and accessing these materials. There is a real lack of audiovisual hardware. If academic departments wish to begin

Library Instruction

Library instruction, as it is practiced in the CLS, falls far short of what it could be. Though it has been deemed an important component of the organization's mission, a well-developed program has yet to be established. Most of the instructional services presently offered take place at Paley and Ambler. Other branches, the departmental libraries, and Special Collections Department are all candidates for areas where even greater efforts should be made in providing instructional services.

Several measures are proposed to take steps in establishing an effective library instruction program:

Recommendation 17 : The Library Instruction Committee (as outlined in the "Organization" section) should facilitate greater communication and coordination of all instruction services throughout the CLS. It is felt that enough issues of concern to the entire CLS require coordination beyond individual departments/units, therefore this group would report to the Deputy Director, and would serve in an advisory capacity on policy issues and have input into other decision-making relevant to instructional services.

Responsibility: Library Instruction Committee

Implementation: September 1984

Source: Task Force on Organization of Public Services

Recommendation 18: Specific issues to be addressed by the Library Instruction Committee should include:

(a) Use of an audio tape tour of the library. Implementation: Fall 1985

(b) Incorporation of computer assisted instuction. Implementation: Fall 1985

(c) Use of video programs for general orientation tours, as well as for instruction of specific library activities and/or sources. Implementation: Fall 1985

(d) Instruction in the use of existing technologies (GEAC, RLIN) and new technologies (on-line catalog). Implementation: Fall 1984

Responsibility: Library Instruction Committee

Source: Task Force on Public Service and Technology

Recommendation 19: Since Paley alone has many diverse needs in providing adequate instructional services, it is recommended that a full-time Bibliographic Instruction Coordinator be hired.

Responsibility: Director

Implementation: Summer 1985

Source: Task Force on Users and Their Changing Needs

Recommendation 20: Specific duties to be included in the BI Coordinator position should include:

(a) Coordinate all library instruction activities within Paley. Implementation: Summer 1985

(b) Develop realistic goals and priorities for the instruction program, in conjunction with the Library Instruction Committee. Implementation: Summer 1985

(c) Develop and conduct training sessions for staff in basic and advanced library/bibliographic instruction methodology, working with the Library Instruction Committee. Implementation: Fall 1985

(d) Determine which segments of the University's population most need instruction, using data gathered from the user survey (see "Statistics and Surveys" section of this report). Implementation: Spring 1987

(e) Foster cooperation between all sites within the CLS offering instruction with regard to statistics gathering, teacher training, and sharing of ideas, through membership on the Library Instruction Committee. Implementation: Summer 1985

(f) Promote library services and resources, by using available campus media and working with the Public Relations Committee. Implementation: Fall 1985

Responsibility: Bibliographic Instruction Coordinator

Source: Task Force on Users and Their Changing Needs, Study Team

Recommendation 21: To provide some direction to a system-wide instruction program, a policy statement should be formulated,

defining library instruction as it relates to users, other services, and staff responsibilities.

Responsibility: Director

Implementation: Summer 1985 (prior to hiring of BI Coordinator)

Source: Task Force on Users and Their Changing Needs

Recommendation 22: While the University is undergoing a general review of its curriculum requirements, looking toward the possibility of establishing a "core curriculum", the inclusion of a basic library skills requirement for graduation should be explored.

Responsibility: Director

Implementation: Immediately

Source: Task Force on Users and Their Changing Needs

Recommendation 23: If an understanding of basic library skills is accepted as a requirement for graduation, the establishment of a library use pre-test will be necessary as a means of measurement.

Responsibility: Director and the Library Instruction Committee

Implementation: Immediately

Source: Task Force on Users and Their Changing Needs

In-depth Reference Service

Many undergraduates and continuing education students need basic explanations of the purpose and use of reference tools; more experienced users sometimes need extensive advice on library research problems. Providing adequate service which meets the needs of both groups has been extremely difficult. In 1981 steps were taken to correct the situation with the establishment of additional service desks. The Catalog Desk was meant to provide assistance in the use of the card catalog, and the Reference Desk was for lengthy, in-depth reference questions; the Information Desk staff would answer the simpler information and directional questions while answering the bulk of the telephone calls.

The Reference Desk, however, has had limited success. It is

SERVICES RECOMMENDATIONS

This section of the Study Team Report covers a wide variety of services, from library instruction to collections. Headings are not assigned, although recommendations concerning the same topic fall together.

Although the UCR Libraries currently offer a wide array of library instruction programs, particularly on the undergraduate level, the Public Services Self-Study revealed the need for a systematic prioritizing for building upon the existing structure. An extensive and thorough discussion of the issue appears in the Task Force Report on Articulating the Library's Public Services Program. The Study Team concurs with the following short-range priorities: Graduate students, New Faculty, and UCR staff. After an examination and discussion of the recommendations, the Study Team presents the following recommendations in priority order.

RECOMMENDATION 33. The Study Team recommends that graduate students receive instruction through the following techniques (for details, refer to the Report from the Task Force on Articulating the Library's Public Services Program, pp. 135-137; the Study Team supports the specific recommendations found in this section):

a. Advanced Research Seminars/Course-integrated instruction
b. Publication: "Library Services for Graduate Students."

In addition to the components to be included as recommended by the ALPS Report, the Study Team further recommends that the publication include information on collections and data bases and on services of the Graduate Student Association when appropriate. There should be separate publications for the Sciences and the Social Sciences/ Humanities in order to highlight information specific to each area.

c. Thesis and Dissertation Seminar

(Source: Articulating the Library's Public Services Program, pp. 135-137: "Of the Library's high-priority user groups, graduate students seem to receive the least attention, both in quantity and quality.")

RESPONSIBILITY: Library Instruction Coordinators for the General Library and the Sciences
IMPLEMENTATION: Begin Fall, 1984

RECOMMENDATION 34. The Study Team recommends that the General Library produce a brochure entitled "Library Services for New Faculty" modeled on the publication done by the Sciences Division in 1983. (Refer to the ALPS Task Force Report, pp. 137-138 for further information on designing and producing the publication). (Source: Articulating the Library's Public Services Program, pp. 137-138: "Faculty members are reached through a number of programs

and informal contacts, but new faculty members who have the most immediate need for general information about the Library are probably not receiving adequate attention.")

RESPONSIBILITY: Pubic Services Advisory Committee in consultation with library instruction coordinators
IMPLEMENTATION: Publication ready for Fall 1984 Quarter

Other recommendations concerning new faculty, such as holding a reception, are to be planned for the Fall, 1985 quarter. A discussion of approaches to the reception appears in the ALPS Task Force Report, pp. 138-139.

RECOMMENDATION 35. The Study Team recommends that the Library Instruction Coordinators explore the possibility of offering a class on library use through the Campus Employee Training and Development Program. If this is not feasible, the Library can offer a seminar or workshop on its own. Further details appear in the ALPS Report, pp. 139-140. (Source: Articulating the Library's Public Services Programs, pp. 139-140: "In the recent past, only two special programs have been directed toward UCR staff [in the Sciences].")

RESPONSIBILITY: Library Instruction Coordinators
IMPLEMENTATION: Spring Quarter, 1985 (to begin exploration)

RECOMMENDATION 36. The Study Team recommends that a conscious effort be made to incorporate new technological applications that affect public services into the instructional programs. These technological applications include but are not limited to MELVYL, online database searching, CLSI, and Innovacq. (Source: Technology, pp. 8-9: "As the Library introduces new technology to provide enhanced access to information resources, the Library must develop systematic programs to educate Library users so that they may take full advantage of the enhanced access capabilities brought upon by the new technology; Role of the Library in the Future, p. 26)

RESPONSIBILITY: Library Instruction Coordinators
IMPLEMENTATION: Fall, 1984

RECOMMENDATION 37. The Study Team recommends that the use of technology for the Library's instructional programs be explored. Specifically, the use of audio-visual materials and computer-assisted instruction (CAI) need to be examined. (Source: Technology, and Public Services, p. 9)

RESPONSIBILITY: Library Instruction Coordinators in consultation with the Director of IMRC/MSC
IMPLEMENTATION: Begin process of exploration, January 1985

ANCILLARY RECOMMENDATIONS

RECOMMENDATION 70. In keeping with the spirit of planning for the future, the Study Team recommends that a Futures Study Group be appointed, voluntary in nature and open to all Library staff. The group will be advisory to the University Librarian and is given the task of scanning the environment and compiling on a regular basis a report of trends important in library planning. The group will be responsible for monitoring trends useful in writing a Library Plan for the 90's and helpful in revising the Plan for the 80's. The Group should utilize the Task Force Report from The Role of the Library in the Future as its starting point.

The Futures Study Group will allow a forum for intellectual stimulation and the growth of creative ideas that can be applied to the practical work environment. This is an important facet in a research library. The Group may hold discussions with faculty on their current and future research, an area holding some promise for future grant applications. The Group represents another way of helping the Library to carry out its mission to the university as a whole.

On a semi-annual basis, the Group will publish a brief newsletter to be disseminated to Library staff and possibly to faculty and appropriate outside groups. The newsletter will focus on trends in the library field, as well as those which affect the field. The Study Group will also report to the staff through the University Librarian's staff meetings. It will report and lead discussion on issues in a Management Workshop. Occasionally a member of the Group should address the Friends of the Library. (Source: Study Team; Role of the Library in the Future, p. 24)

RESPONSIBILITY: University Librarian
IMPLEMENTATION: Appointed by Fall, 1984

RECOMMENDATION 71. The Study Team recommends that the Public Services Advisory Committee, working in conjunction with the AUL, devise a mechanism for continually monitoring services to ensure that priorities are met. We recommend that the AUL continue to coordinate all major surveys to ensure validity, compatability, and comparability of similar Library Surveys. We recommend that every three years, a short survey be placed in the registration packet going to seniors to find out what use has been made of the Library. (Source: Study Team; Service Performance and Service Needs, p. 7)

RESPONSIBILITY: AUL/Public Services Advisory Committee
IMPLEMENTATION: On-going

RECOMMENDATION 72. There were very few responses to the user survey from the offsite, affiliated UCR personnel. Since most of these are CNAS affiliated,

spec
OMS
Systems and Procedures Exchange Center

CAI/Technology

University of Florida

ORDER FORM

Orders should be sent to **How To Search OCLC**, Room 217 Library West, University of Florida
Gainesville, Florida 32611

Send _____ **How To Search OCLC** packages @ $245.00 each for a total of $_____ to the following address (if required, add $12.25 sales tax for Florida delivery):

Name_____

Institution_____

Address_____

City_____ State_____ Zip_____

Libraries/institutions issuing PO's will be billed. All others must prepay in $US drawn on a US bank. All checks must be made payable to the University of Florida Foundation, Inc. Orders containing checks made payable to the University of Florida will be returned.

Remember
How To Search OCLC
requires

IBM®PC with at least 128K
Double sided disc drive
Color monitor optional
or
M300

Running Time
Complete Course in 4 hours
Brief Course in 1 hour

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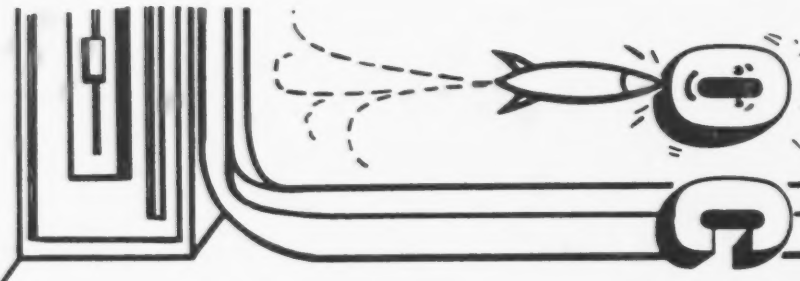


Makes Learning FUN For All Library Staff

FOR IBM® PERSONAL COMPUTER

©1984 University of Florida
by authors Suzanne J. Shaw
Sally Brook Bethea
Terrence D. McIntyre

HOW TO SEARCH OCLC
is an innovative way to
CUT TRAINING COSTS!

How To Search OCLC is a simple to use software package developed by catalogers at the University of Florida which will save staff time and increase the efficiency and the accuracy of searching the OCLC database.

THE PROGRAM:

- is self-instructing and self-paced;
- saves training time;
- draws its drill and practice examples at random from large files, so it is never boring or repetitious;
- operates on a IBM• PC, so it saves on-line terminal time.

In addition, **How To Search OCLC**

- is concerned solely with searching and covers all details such as the Mc/Mac rule and the Stoplist;
- avoids technical jargon;
- allows flexibility—lessons are conveniently arranged in four one hour sessions;
- makes lessons enjoyable, because the program is designed as a computer game.

System Requirements

- IBM• PC, at least 128K
- Double sided disc drive
- Color monitor optional

** OR ** M300

Traditional one-on-one methods of training staff to search OCLC are costly in both staff time and computer time. These methods:

- use the trainer's time to repeat the same lessons;
- require trainer to gather examples to illustrate the fine points of OCLC use;
- take valuable OCLC terminal time.

How To Search OCLC will cut these training costs!

Who Can Use It?

- Student assistants and clerical staff in Technical Service areas;
- Experienced staff at all levels, as a refresher;
- New professionals and paraprofessionals, as an orientation;
- The general public, where there is access to OCLC;
- Undergraduate and graduate students in Library Science;
- Reference, Collection Development, and ILL staffs.

Package Consists of:

- 1 5¼" floppy disc
- Information Manual
- "Cheat Sheet"
- M300 guidelines

How To Search OCLC
217 Library West
University of Florida
Gainesville, Florida 32611

Additional Information About "How to Search OCLC" Software

The "How to Search OCLC" program was written by professional catalogers at the University of Florida who saw a need to improve the quality of search training while cutting down on the costs of the trainer's time and OCLC on-line time. As you may know, OCLC plans to begin charging for searches at the beginning of next year, so the CAI approach has become even more attractive.

The actual programming was done by a high honors student in Computer and Information Science, who also happened to be a student assistant in Cataloging. The main program is in IBM BASIC, with five subsidiary data files containing the lesson texts and quiz examples. The example files are quite large, and since questions are drawn and matched at random, the program is always different and therefore challenging. Over 55,000 different author/title combinations are possible.

The program has many features of a video game. It has attractive graphics (although a graphics interface is not required) and optional sound effects. If a color monitor is available, the color coding helps the user keep track of his place in the program. Quizzes and tests are scored, and the score is constantly displayed. The most popular part of the program has proved to be the all-encompassing exercise called "The Grand Slam Exam," which presents sample title pages and asks the user to construct author, title and author/title search keys. If a wrong answer is given, one of the user's five "men" is shot down (an animinated effect students find particularly amusing). There is a "Hall of Fame" on each disc which records the name and scores of the top ranking Grand Slam players.

The program has been tested on over 60 library staff members ranging from beginning students to experienced professionals. It has never once "crashed." The response has been overwhelmingly favorable; even the most experienced searchers tell us they learned something about OCLC use that was new to them. If there has been any problem, it is getting people to stop using the program once the lessons have been mastered, an indication of how entertaining it is. The positive attitude generated seems to make the lessons more memorable, and to carry over into actual on-line searching.

A typical reaction is that of Ann Plumstead, an LTA I who recently transferred into the UF Catalog Dept.:

> "I had used OCLC for two years in my last job, but I realized I didn't know beans about it when I used this program. I'd wasted all kinds of time and effort by not understanding things about the stoplist, and no one ever told me about Mc/Mac. This program is so much more efficient and thorough than any trainer could be."

The program was also extensively tested by members of UF's Legal Information Center. The enclosed letter relates their experience.

Although the program is aimed principally at beginning student assistants in Technical Services with little or no bibliographic experience, it has applications as a training course for new paraprofessionals and as a refresher course for more experienced paraprofessionals and professionals in Public Services as well as Technical Services. The documentation which accompanies the package outlines specific course suggestions tailored for various types of staff. The program's flexibility permits a variety of depth and detail to be learned, as well as allowing the freedom to easily page back and forth within the lessons.

The authors plan to update the program periodically as OCLC's search strategies evolve. This is, of course, one of the great advantages of CAI — the ease with which it may be modified and improved. Later versions of the package will be provided to purchasers of the original at a nominal fee.

Aside from the Information Manual mentioned above, no other written material about the program exists, with the exception of a report written by the programmer, Terry McIntyre, as part of his Senior Project. It is quite technical, but arrangements can be made for those interested to obtain a copy.

Staff at Florida have been quite pleased with the results of the program's use as a training tool, and feel it can make a valuable contribution to any library that uses OCLC.

If you have specific questions, contact Suzy Shaw, Head, Serials Cataloging Section, The University of Florida Libraries, Gainesville, FL, 32611. (Phone: 904-392-0351)

University of Delaware

THE UNIVERSITY LIBRARY
OFFICE OF THE DIRECTOR
NEWARK, DELAWARE 19717-5267

(302) 451-2231

January 1986

Computer-Assisted Bibliographic Instruction at the University of Delaware Library

Information Sheet

Description

The University of Delaware Library has used computer-assisted instruction to teach library research skills to freshman English students enrolled in a required critical reading and writing course since 1981. Computer-assisted instruction was chosen to replace the traditional bibliographic lecture because of its many advantages to librarians, students, and English Department faculty. Librarians are able to use the hours previously spent lecturing to provide more advanced bibliographic instruction and for other responsibilities. Students are able to learn at their own pace, receive immediate helpful feedback if questions within lessons are incorrectly answered, have the option of reviewing material not mastered, and see examples from indexes, catalog cards and other tools not easily visualized. The graphics and interactive nature of the lessons make learning more interesting and efficient. Faculty are able to receive a record of each student's progress.

Background

In 1981, a team of reference and other librarians working with staff from the University of Delaware Office of Computer-Based Instruction developed five lessons for the mainframe PLATO® system on library research strategy. These lessons were based on materials developed over a number of years by the University of Delaware Library Reference Department as a part of its bibliographic instruction program. Each year approximately three thousand University of Delaware freshmen use the lessons to develop library research strategies for their term paper research. The lessons are used in conjunction with a self-guided library tour and an assignment in the library and employ computer interaction, flexibility, graphics, and individualized instruction. The lessons take about an hour to complete and provide information that is new to most students. Test results are sent to each instructor.

Experience

Between 1981 and 1985 the lessons were successfully used by more than 12,000 students at the University of Delaware. They were also extensively evaluated, reviewed, and revised during this time. Because the expression of interest in the lessons from the field was extensive, the decision was made in 1983 to convert them to run on the IBM Personal Computer and other compatible machines, and to make the lessons available for purchase. The conversion process took two years because of the need to redesign and reprogram the lessons.

All information specific to the University of Delaware Library was removed and the lessons were modified to allow for the different screen size and different graphics capability of the IBM-PC. Reference and other librarians and programmers expended great effort to include material applicable in most library settings.

The lessons were reduced to four, which teach:

1) the use of the card catalog and the Library of Congress Subject Headings (LCSH)
2) periodical indexes
3) newspaper indexes
4) government documents indexes.

Representative screen displays are reproduced at the end of this Information Sheet.

Benefits

The lessons benefit undergraduates working for the first time in a larger library setting; students locating information for term papers; researchers or graduate students reviewing basic library search strategies· foreign students learning about the organization of information in libraries; and high school students or others developing or reviewing information-gathering skills. The lessons may be used by students with little prior knowledge of libraries. The information learned may be applied in a wide variety of library settings.

The benefits of using computer-assisted bibliographic instruction at the University of Delaware Library have been many. Substituting computer assisted instruction lessons for bibliographic lectures to 3,000 freshmen English students is projected to have saved University of Delaware librarians a minimum of 150 professional hours annually. The benefits, for most students, are also evident; testing and evaluation done at the University of Delaware Library have shown that students learn as well as they did in the classroom, enjoy the learning process more, and appreciate the flexibility and immediate feedback provided.

Service to Profession

By converting the lessons to run on the IBM-PC and other compatible machines, thereby making them available to other libraries, it is hoped that the task of providing bibliographic instruction will be made easier and more effective for other libraries which lack the time and resources to develop CAI lessons themselves.

Availability

Library Research Skills: Four Programs for the IBM Personal Computer runs on the IBM Personal Computer with a minimum of 128 K of memory. The IBM Monochrome Display is recommended. The programs may also be used on the IBM AT, XT, and PCjr, and on the Zenith Z-150 and the OCLC Model 300.

Library Research Skills: Four Programs for the IBM Personal Computer is available from the University of Delaware. Questions about the content and use of the lessons may be addressed directly to:

Library Research Skills
Office of the Director
University of Delaware Library
Newark, DE 19717-5267
Phone: (302) 451-2231

Persons interested in demonstrations or pricing, licensing, or purchasing information may request them from:

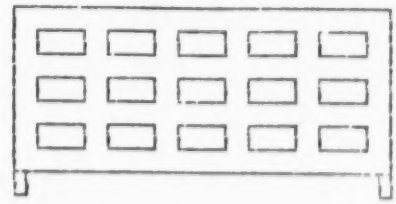
Customer Services
Office of Computer-Based Instruction
Willard Hall Education Building
University of Delaware
Newark, DE 19716
Phone: (302) 451-8161

BEST COPY AVAILABLE

THE CARD CATALOG AND GOVERNMENT DOCUMENTS INDEXES PROGRAMS

Library Research Skills

THE CARD CATALOG



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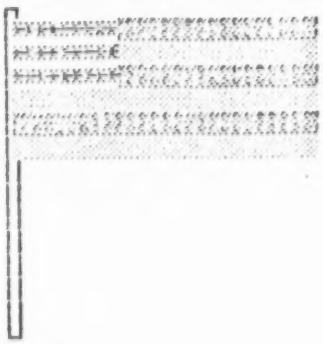
Press RETURN to continue.

Library Research Skills

GOVERNMENT DOCUMENTS INDEXES

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Press RETURN to continue.

BEST COPY AVAILABLE

SAMPLE SCREENS, THE CARD CATALOG PROGRAM

Here is an example from the Library of Congress Subject Headings.

```
Solar energy

    sa  Photovoltaic power generation
        Solar collectors
        Solar engines
        Solar heating
     x  Solar power
    xx  Power resources
        Renewable energy resources
     -  Law and legislation
```

Type "t" for true or "f" for false.

The "sa" means "see also" and refers to related subject headings found in the card catalog.
>> t

Correct. Press RETURN.

This is what you would find when you looked up "Manned space flight."

The "x" means that the heading listed is not used in the card catalog.

```
Manned space flight

  sa  Apollo Soyuz Test Project
      Astronauts
      Extravehicular activity
       (manned space flight)
      Outer space-Exploration
      Skylab Program
      Space suits
  x   Spaceflight, manned
  xx  Astronautics
      Space medicine
   -  Systems engineering
```

Press RETURN.

70 University of Delaware Library, 1986

The MELVYL™ Online Library Catalog

Academic Computing Services
Library, 218 Evans Hall
University of California
Berkeley, California 94720
415-642-5205

GEN 2.2.2 November 1985

Abstract

The MELVYL Library Catalog System is a centralized database of nearly 2½ million book titles at libraries on the nine UC campuses. In addition, the MELVYL catalog provides an extensive listing of periodical titles within the collections of the nine UC campuses, Stanford University, the University of Southern California, and the nineteen campuses of the California State University system. Searches can be initiated from the standpoint of various items such as author, subject matter, title, organization affiliation, or combinations thereof. Access to the MELVYL catalog is available through the dedicated terminals at most campus libraries. Access is also available via the UC Berkeley port selectors, using any standard ASCII terminal or personal computer running YTERM, Kermit, or some other ASCII terminal emulation program.

Credits

This document is a compilation of articles previously published in the *Academic Computing Newsletter* of the University of California, Berkeley. The authors are: Anne Lipow, Library Education Officer; Mary Engle, Division of Library Automation; and David Wasley, Computer Facilities and Communications. MELVYL is a trademark of the Regents of the University of California. MELVYL screens: copyright 1985, Regents of the University of California. All rights reserved.

Contents

Page	Section
2	The MELVYL Library Catalog System
3	Access to the MELVYL Catalog from the Port Selectors
4	Using Personal Computers to Access the MELVYL Online Catalog
7	MELVYL Online Catalog User's Guide

Additional Documentation

The *MELVYL Catalog Flip Guide* is available for reference next to most terminals in the campus libraries, and in the Computing Services Library, 218 Evans Hall. You may also wish to see the *MELVYL Catalog Reference Manual*, available at most library reference desks, for detailed information about how the online catalog works.

Additional Information

For more information concerning the MELVYL catalog, please call the Office of the University Librarian at UC Berkeley, 642-3773. Questions about port selector and related problems should be addressed to the Academic Computing Services Consultants at 642-4072.

The MELVYL Library Catalog System

The MELVYL online catalog is a valuable resource; it contains approximately 2½ million records and is growing daily. However, the MELVYL catalog is not yet a complete listing for any of the libraries — especially Berkeley's, where less than 40% of the library's monographic holdings (as opposed to periodicals, newspapers, etc.) are in the MELVYL catalog. Therefore, to conduct a complete search, it is best to use the MELVYL catalog in conjunction with Berkeley's local catalog system. (For pre-1977 material, start with Catalog 1, the card catalog in the Main Library; for publications printed after 1977, use Catalog 2, the microfiche catalog, available throughout the General Library system.)

Because catalog records are added on a campus-by-campus basis, one might be misled into assuming that Berkeley does not own titles which are actually in the collection but shown to be only at other campuses. For example, if you search for books by John Milton, the MELVYL catalog retrieves 175 titles, only 24 of which are listed from the Berkeley collection; the other 151 titles are listed as owned by other campuses. In fact, Berkeley owns all 175 titles (and more), and they can be found by using Catalogs 1 and 2 as illustrated above.

Why bother with the MELVYL catalog when there are so few of Berkeley's holdings in it? Its unique ability to search by keyword enables you to search a subject comprehensively or to obtain an exact citation. Also, in the cases of books which Berkeley does not own, the online catalog may inform you of copies at other campuses (which, if you are eligible, you may borrow by applying to Interlibrary Borrowing, 303 Main Library).

Use of the MELVYL catalog system is straightforward. There are two methods of searching available: LOOKUP, which handles only simple searches for a particular author, title, or subject; and COMMAND, for more powerful manipulation of the catalog and more precise results, through use of Boolean operators, truncation, and numerous other features. LOOKUP can be learned very quickly, since the system guides you step by step through the search. COMMAND takes a bit of time to learn, but is well worth the effort.

How to Learn LOOKUP Mode

To learn LOOKUP, first logon to MELVYL (see the section entitled "Logon Procedures," further on in this document). Once you have logged on, MELVYL will prompt you as to whether you wish to use LOOKUP or COMMAND mode. To initiate LOOKUP mode, enter the character "L" and press return. MELVYL will then guide you through the LOOKUP process until your search is complete.

How to Learn COMMAND Mode

1. Attend a one-hour instruction session, offered every Tuesday from 10:00 a.m. to 11:00 a.m. and every Wednesday from 2:00 p.m. to 3:00 p.m., Main Library Loan Hall, second floor. (No reservations; be at terminals in the center of the room.)

2. Refer to the *MELVYL Catalog Flip Guide*: 13 leaves, each in a plastic cover, in an easel binder that stands by the terminals in campus libraries. There is also a reference copy in the Computing Services Library in 218 Evans Hall. You can also purchase a copy of the *MELVYL Catalog Flip Guide* from the Main Library; $30 purchase price includes a limited subscription to updates. To order a copy, call 642-3773.

3. See the *MELVYL Reference Manual*, available at most library reference desks, for detailed information about how the online catalog works.

4. Use the command **explain** to get an explanation of any feature — for example, **explain find**. For a list of features or words that the MELVYL catalog explains, type **explain glossary**.

5. Use the online HELP screens and/or ask for help at the Library reference desk.

6. Refer to the two-page *MELVYL Online Catalog User's Guide* at the back of this document. The guide is intended to serve as a reminder after you've learned COMMAND mode in some depth. Because of this, you may find it is not sufficiently detailed for effective searching; therefore, it is advised that you first follow the procedures outlined above.

Currently, there are online catalog terminals in the Main Library and in most of the branch libraries on campus, and more terminals are gradually being added. You can also access the MELVYL catalog from your office or home computer via the Computer Center network. (See below.)

Access to the MELVYL Catalog from the Port Selectors

It is now possible to access the MELVYL library information database system from the CFC port selectors. Several other UC campuses have already installed communication lines to connect users' terminals to the Systemwide computer which contains the MELVYL database; the service was added at Berkeley on May 10, 1985.

To access the MELVYL system, the terminal you use must be operating at either 1200 or 9600 baud. There are only two ports at each speed on each port selector (eight ports total). This is obviously a scarce resource, and it is not possible to acquire more ports at this time. Therefore we ask that users please not stay connected to the MELVYL system any longer than necessary. As a rule, 15 minutes should be the longest continuous session.

Users connecting at 9600 baud may perceive that output is appearing at a slower rate. This is because the MELVYL catalog host computer is actually only capable of sending data at 1200 baud. We are using a baud rate translator to provide 9600-baud service, but characters still appear at the rate of only 120 per second.

The logon procedure for dialup access and terminal configuration settings for both terminals and personal computers emulating terminals are described below.

Configuration Settings

For both terminals and personal computers emulating terminals, the configuration settings are given below. For terminals, you may need to set the hardware dip switches. For personal computers, the software handles configuration settings. The configuration settings should be as follows:

Baud Rate:	1200 or 9600
Parity:	EVEN PARITY
Data Bits:	7
Stop Bits:	1
Full Duplex:	YES or Y
LF/AutoLF:	NO
Strip Chars:	NO (DLA computers provide an LF RETURN at the end of each line)
XON/XOFF or Pacing:	NO

Logon Procedures

For direct access: Press the red port selector button and follow the instructions under "Logon Procedures," below.

For dialup access: To gain dialup access to the catalog, you will need a 1200 baud modem. Dial one of the following UC Berkeley port selector numbers: 642-7400 (or 642-6870 for Racal-Vadic modems).

1. After the port selector banner, you will see the "Request" prompt, to which you should respond by typing **melvyl** (in either upper or lowercase) and then pressing **RETURN**, as in the following example.

   CFC: PORT SELECTOR 3
   Request: **melvyl**

   After seeing the "CONNECTING" response, press the **RETURN** key again.

2. Next you will see the following message:

   Enter a terminal type or HELP for a List of Codes. TERMINAL?

   (If you do not see the above message, press the **RETURN** key again.) The codes recognized by the MELVYL catalog are not the same as those used by the UCB computers. Type **help** for a list of MELVYL catalog terminal types which are three characters, for example, **A99**. The first character is always a letter that defines the terminal type. After finding the appropriate code for your terminal type, type it in after the "TERMINAL?" prompt and press the RETURN key.

3. The catalog will respond with the WELCOME screen. If you are not familiar with the MELVYL catalog command language, type **help** at any time.

4. Type **end**, **logout**, **logoff**, or **quit** to exit the MELVYL system.

Using Personal Computers to Access the MELVYL Online Catalog

Any ASCII terminal or personal computer with ASCII terminal emulation software can be used to access the MELVYL catalog. You must know how to start up the terminal program on your personal computer and what terminal type your PC emulates. If you do not know the terminal type, use the code for Teletype Model 33, **A99**, or the code for "unknown" terminals, **Z99** (see Steps 4 and 5, below).

If you are using a personal computer with YTERM or Kermit, you must give special attention to the type of keyboard that you select at login. The MELVYL catalog recognizes the standard ASCII keyboard, which is available with YTERM and Kermit. Follow these steps to dial in.

Using YTERM

1. Initialize and ready YTERM. You can use the batch file for UNIX provided with the YTERM diskette by typing **yu** or **yu 1200**, etc. If you don't have the batch file, type:

   X 7
   T *1200* **K**

   where 1200 is your baud rate. (Note: you can use 9600 baud if wired directly to the port selector. However, you may notice that the display output appears

somewhat jerky at this speed.)

2. YTERM will give the following prompt:

   PLEASE ENTER NAME OF KEYBOARD TABLE:

   Select the ASCII keyboard by typing in **ascii**.

3. Either push your red port selector button, or dial the Berkeley port selector telephone number. For 1200 baud, the number is 642-7400 (or 642-6870 for Racal-Vadic modems).

4. After the port selector banner, you will see the "Request" prompt, to which you should respond by typing **melvyl** (in either upper or lowercase) and then pressing **ENTER**, as in the following example.

   CFC: PORT SELECTOR 3
   Request: **melvyl**

   After seeing the "CONNECTING" response, press the **ENTER** key again.

5. Next you will see the following message:

   Enter a terminal type or HELP for a List of Codes. TERMINAL?

   (If you do not see the above message, press the **ENTER** key again.) Respond by either typing **help** or by entering your terminal type (for example, **L99** for YTERM).

6. From here, the MELVYL catalog will prompt you. If you are not familiar with the MELVYL command language, type **help** at any time.

Note: You must use the ASCII keyboard with YTERM in order to send the correct characters for backspace and break. If you have been using a keyboard other than ASCII, you must switch to YTERM's ASCII keyboard by pressing **CTRL** and **BREAK** (Scroll Lock) simultaneously. This temporarily returns you to DOS where you must reissue the **T** command, as in Step 1, above.

YTERM Keyboard Reassignments: Some of the important functions that you will need are:

ALT - BREAK	Break signal (stops continuous output)
CTRL - BREAK	Returns to PC-DOS
SHIFT - PrtSc	Prints the screen image
CTRL - PrtSc	Turns continuous printing on
ALT - PrtSc	Turns printing off
CTRL - ALT - Del	Re-boots PC-DOS

See the document *Using YTERM at UC Berkeley*, MIC 2.3.1, available in the Computing Services Library, 218 Evans Hall, for further details on YTERM and the ASCII keyboard.

Using Kermit

1. To start Kermit, type **mskermit**.

2. Initialize the communications parameters by typing **do cmsl**.

3. Either push the red port selector button, or dial the Berkeley port selector telephone number. For 1200 baud, the number is 642-7400 (or 642-6870 for Racal-Vadic modems).

4. After the port selector banner, you will see the "Request" prompt, to which you should respond by typing **melvyl** (in either upper or lowercase) and then by pressing **ENTER**, as in the following example.

   CFC: PORT SELECTOR 3
   Request: **melvyl**

   After seeing the "CONNECTING" response, press ENTER again.

5. Next you will see the following message:

   Enter a terminal type or HELP for a List of Codes. TERMINAL?

   (If you do not see the above message, press the ENTER key again.) Respond by either typing **help** or by entering your terminal type (for example, **J99** for Kermit).

6. From here, the MELVYL catalog will prompt you. If you are not familiar with the MELVYL command language, type **help** at any time.

Kermit Keyboard Reassignments: Some of the important functions you will need are:

SHIFT - PrtSc	Prints the screen image
CTRL - PrtSc	Toggles printing on/off
CTRL - Alt - Del	Re-boots PC-DOS (press all three keys simultaneously)
CTRL -] b	Break signal - stops continuous output (**Ctrl-]** followed by **b**)
CTRL -] c	Returns to MS-KERMIT
EXIT	Returns to DOS

Note: MS-KERMIT UCB 227.14 has a bug in Ctrl - Break. Use Ctrl -] followed by a **b**.

Screen output while "connected" can be saved to a DOS file by the "logging" function of MS-KERMIT UCB 227.14. The MS-KERMIT commands are: **LOG** *name.typ* to start logging (saving) to DOS file "*name.typ*"; and **CLOSE** to write the last buffer and close the file. There are also "escape" commands which temporarily quit (**Ctrl-] q**) or resume (**Ctrl-] r**) logging while connected (but only after initiating the logging process with the **LOG** command).

Typically, you would log onto the MELVYL catalog in the usual manner and proceed to the point where you wished to save display output. Return to MS-KERMIT command mode with the **Ctrl-] c** command and give the **LOG** command to start logging to the file. Then return to "connected" mode with the **CONNECT** command and use the appropriate MELVYL command for starting the display you wish to save. When the display has completed, return to MS-KERMIT command mode with **Ctrl-] c** and enter the command **CLOSE**.

For further details on Kermit and the ASCII keyboard, see the document *Using MS-KERMIT on the IBM PC at UC Berkeley*, MIC 2.2.8, available in the Computing Services Library, 218 Evans Hall.

The UC Berkeley User's Guide to the MELVYL™ Online Catalog: BASIC FACTS

See Other Side for a Review of COMMAND Mode

What is in the MELVYL Catalog?

The MELVYL catalog consists of two separate files:

BOOKS File:

- lists approximately two million books at libraries on all nine UC campuses, and is growing daily;
- is accessible in both COMMAND mode and LOOKUP mode;
- contains information about books only—no periodical titles (but see below), and does not yet contain maps or audiovisual materials.

PERIODICALS File:

- is accessible only in COMMAND mode;
- currently lists over 550,000 periodical titles, showing holdings in the libraries of 30 campuses: UC (9), CSU (19), Stanford, and USC;
- is infrequently updated;
- often contains incomplete information. (Use CATALOG 2 Serials, on microfiche, for more complete, up-to-date information.)

Using the Terminal

Always wait for the prompt arrow (→) to appear on the screen before typing.

To start	Type **start**, press RETURN key
To go directly to COMMAND mode	Type **start command**, press RETURN key
To send your request to the computer	Press RETURN key
To erase a mistake	Press BACKSPACE key over error, then retype your request
To cancel a request or stop a continuous display	Press BREAK key
To end a session	Type **end**, press RETURN key

What's Not in the MELVYL Catalog?

The MELVYL catalog is not yet complete for any library. For Berkeley, the MELVYL catalog does not yet contain the millions of records listed in CATALOGS 1 and 2 which need to be converted to a computer-readable form acceptable to the online catalog. This record conversion is being done piecemeal as funds become available.

Berkeley's records not yet included in the MELVYL catalog are mainly:

- books received before 1977;
- Some recently received titles that are in CATALOG 2 by brief listing only.

Therefore, the MELVYL catalog will often indicate that Berkeley doesn't own a book when in fact Berkeley does own it.

Getting Started

Type **start** and press the RETURN key to start a session.

Choose a search method by typing **c** (for COMMAND mode) or **l** (for LOOKUP mode).

COMMAND mode allows you to take advantage of all of the MELVYL catalog features. It requires that you use a simple command language (see other side of this page) to specify the indexes and terms you wish to search. COMMAND is the **recommended search method** for regular users of the online catalog or any user whose search problem is complex.

LOOKUP mode is a question-and-response method of searching and can be used without learning commands. But searching is slower and inflexible, and many features that enable you to refine a search are not available in this mode. Recommended only for infrequent users who have simple searches.

How Does the MELVYL Catalog Differ from the Two Other UC Berkeley Catalogs?

The MELVYL catalog is one of three catalogs that make up the UC Berkeley catalog system:

- CATALOG 1 (on cards)
- CATALOG 2 (on microfiche)
- MELVYL CATALOG (online via terminals)

No one of these catalogs is a substitute for the other. Each contains unique information. Each has strengths that compensate for the limitations of the other two. **So always check UC Berkeley's other two catalogs when:**

- the title you want isn't listed in the MELVYL catalog, or
- the title you want is listed in the MELVYL catalog but doesn't show Berkeley as an owning location.

Ask at the reference desk whenever you don't find what you're looking for.

Whenever You Need Help

Type **help** anytime during a session when you are unsure of what to do next, or when you want an explanation of the choices being offered to you.

How to Keep Up with Changes

To learn about the MELVYL catalog's latest features or how it is growing, get into COMMAND mode and type **show news**. To see UCB Library news, type **explain ucb news**.

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The UC Berkeley User's Guide to the MELVYL Online Catalog: THE COMMAND LANGUAGE

See Other Side for Basic Facts About the MELVYL Catalog

This guide is intended to serve as a reminder after you've learned MELVYL COMMAND mode in some depth. To learn COMMAND mode: 1) Take the one-hour instruction in COMMAND mode offered every Tuesday from 10:00 a.m. to 11:00 a.m. and every Wednesday from 2:00 p.m. to 3:00 p.m. at the terminals in the Main Library Loan Hall (second floor). 2) Use the FLIP GUIDE located next to most terminals in the library. 3) Use the MELVYL command **explain** to get an explanation of any feature. For a list of features or words that MELVYL explains, type **explain glossary**. 4) See the *MELVYL REFERENCE MANUAL*, available at most library reference desks, for detailed information about how the online catalog works.

How to Search for BOOKS

To Search By	Type Search Request	Examples
Personal author	find pa *author's name*	find pa *Carl Sagan* f pa *James, Henry*
Corporate (org.) author	f xc *exact org. name* f ca *words in org. name*	f xc *Eastman Kodak #* f ca *DNS Symposium*
Any author	f au *any name*	f au *Carnegie*
Title	f xt *exact title* f ti *title words*	f xt *Pathfinders #* f ti *Garp*
Subject	f xs *exact subject* f su *LC subject words*	f xs *medical ethics #* f su *sign language*
Series	f se *series words*	f se *rivers America*

- For speedier results, use exact searches (xc, xt, xs) where possible, followed by #. For example: f xt *Giovanni's Room #*
- To find words beginning with the same letters, use ...#. For example: f ti *hypno#* (*hypnotism, hypnosis, hypnotist, hypnotists, hypnotic*)

How to Search for PERIODICAL TITLES

To search for periodicals (serials, journals, newspapers), type f pe *title words*. For example:

f pe *IEEE Communications*

f pe *Hypno#*

f pe *Santa Cruz Sentinel*

You can search for periodicals by titles only, not by subject, except as the subject is reflected in title words. For articles on your subject, use printed periodical indexes, or ask at the Reference Desk.

To Combine Searches for BOOKS

To combine searches, use **and**, **or**, or **and not**.

To Search By	Examples
Author and title	f pa *Sheehy* **and** xt *Passages #*
Title and subject	f ti *magic* **or** su *magic*
Subjects	f su *logging* **or** *lumber*

- To broaden search, use **or**. For example: f su *genes* **or** *chromosomes*
- To narrow search, use **and** or **and not**. For example: f su *job stress* **and** *teachers*.
  f su *job stress* **and not** *nurses*

Need Help? Ask for assistance at the refe... ce desk of any library with a MELVYL catalog terminal, or call 64-BOOKS.

How to Display Your Search Results

To see books listed with their call numbers, type display or d. The result will be similar to the following screen display:

```
1  Sheehy, Gail
     Pathfinders / Gail Sheehy  1st ed
     New York  Morrow, 1981
     UCB  Main       HQ799.95 .S48
     UCI  Main Lib   HQ799.95 .S48
     UCLA College    HQ799.95 .S48
     UCSC McHenry    HQ799.95 .S48
```

To see one-line listings for quick scanning, type d **review** or d **rev**. The result will be similar to the following screen display:

```
1  Sheehy, Gail  Hustling : prostitution in our wide  1973
2  Sheehy, Gail  Lovesounds  1970
3  Sheehy, Gail  Passages : predictable crises of  1976
4  Sheehy, Gail  Pathfinders / Gail Sheehy  1981
```

To see the most complete information for a book, type d **long**. The result will be similar to the following screen display:

```
Author      Sheehy, Gail
Title       Pathfinders / Gail Sheehy  1st ed  New York  Morrow, 1981
            xi, 464 p. ; 24 cm.
Notes       Includes index
            Bibliography: p. 474-480
Subjects    Adulthood
            Middle age
            Contentment
            Self actualization (Psychology)
            Quality of life
            Social surveys
Call numbers  UCB Main HQ799.95 .S48
              UCD Main HQ799.95 .S48 (CU-A)
              (Record 5 continues on the next screen.)
```

To see some of the books, type d *numbers from list of results*. For example: d 5, d **rev** 1-5, or d 5 **long**.
To see results at selected UC libraries, type **at** *library code*. For example: **at** *ucb*, or **at** *ucd ucsc*.
To return to results at all UC libraries, type **at uc**.
Remember: FOR ANY GIVEN TITLE, THE MELVYL CATALOG DOES NOT LIST ALL LIBRARY LOCATIONS. UCB LIBRARIES MAY OWN A BOOK EVEN THOUGH NO LOCAL CALL NUMBER IS LISTED.

How to Browse Headings for BOOKS

Type **browse su** *subject words*. For example: **browse su** *gardens*
Or, type **bro pa** *author's name*. For example: **bro pa** *marquez*
Or, type **bro ca** *org*. For example: **bro ca** *Bell Telephone*

How to Search for BOOKS Using Headings You Find from a Browse Command

To search for books without retyping the headings resulting from a browse command, type **select** or **sel** followed by the numbers of the headings. **sel 3 9 10**

u.c. General Library, September 1985 LOL26 2m/82/rev 9.85

University of California, Berkeley

December 17, 1985

Staff Microcomputer Training in the UC Berkeley General Library

Microcomputers were first introduced into the Library as terminals for on-line catalog mainterance; staff members were quick to see the possibilities these machines held for other applications, and some trained themselves in microcomputer usage. These self-trained innovators were enlisted as trainers by the Library's Staff Education Officer, and, in January 1985, the Library began a program to educate its staff in the use of microcomputers. The Library had originally acquired DOS, WordPerfect, Lotus 1-2-3, and Friday software packages for staff use. The trainers all felt that educating staff in the use of these packages would serve, additionally, to teach important microcomputer concepts.

The classes are presented in the campus Microcomputer Laboratory, with groups of ten trainees and 4 to 5 trainers. WordPerfect instruction includes a two-hour session on WordPerfect and a two-hour session covering DOS and printer use. Lotus 1-2-3 and Friday instruction comprises two two-hour sessions per package. All instruction is at an elementary level: emphasis is placed on acquainting staff with the microcomputer, on demonstrating the capabilities of each package, and on providing tools which will aid trainees in improving their own skills. The use of multiple trainers is the most effective aspect of the training; a principal instructor gives explanations and presents each task, while the assistant instructors are available to provide individual guidance, and to troubleshoot problems which arise. Data disks containing sample application files are provided for each session.

Thus far, 160 staff have been trained in 9 WordPerfect sessions, 6 Lotus sessions, and 3 Friday(1) sessions; six staff from another institution have attended the Lotus sessions. The Microcomputer Laboratory is not an ideal training site; the room, which contains approximately 60 terminals, is open for drop-in use, is a noisy training environment, and is available to us only between semesters. Although we have provided training for most staff who originally needed it, a continuing need for instruction has become evident. There is turnover among staff; new releases of software packages can necessitate re-training; the acquisition by the Library of new software packages creates new training needs; and growing sophistication of staff applications staff is creating a need for advanced instruction. Fortunately, as staff experience with and knowledge of microcomputers grows, the pool of trainers also grows. Training responsibilities now reside in the Library Systems Office. With the

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1Use of the Friday software package is no longer supported; the General Library is searching for a database management package to replace Friday.

Library's acquisition of two IBM PCs explicitly for training, the Library Systems Office plans to start an ongoing program of weekly, two-pupil instruction sessions.

LOTUS COURSE OUTLINE

STARTING UP

A. OVERVIEW OF FUNCTIONS AND USES OF LOTUS
B. INSERT SYSTEM DISK (DOS IS INSTALLED)
C. INSERT PRE-PROGRAMED B DRIVE DISK
D. HOW TO GET INTO LOTUS SYSTEM

SCREEN AND BOARD FAMILIARIZATION

A. MENU EXPLANATION
B. ESCAPE COMMAND
C. TAB AND SHIFT KEY AND CAPS - SCROLL LOCK, ETC.
D. TEMPLATE FUNCTIONS

ENTER SAMPLE INFORMATION

A. LABELS
B. NUMBERS (RIGHT JUSTIFY IF MATH)

STUDENT HOURS FORMULA WORKSHEET

A. LABELS
B. HOURS
C. ADD - BY CELLS AND WITH SUM FUNCTION
D. MULTIPLY HOURS BY HOURLY RATE
E. "UNCOUPLING" PROBLEMS

EDITING

A. EDIT FUNCTION KEY
B. MOVE
C. INSERT, ETC.

MATH FUNCTIONS

A. AT SIGN
B. AVERAGE
C. COUNT
D. SEQUENTIAL WITH BRACKETS ()

SORT BY ALPHABETIC ARRANGEMENT

PRINT COMMAND AND SEQUENCE

WORD-PROCESSING FUNCTION

CELL REVEAL

EXIT - SAVE WORK

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LOTUS 1-2-3, part 2, Some Useful Functions

* Edit key (F2) allows you to edit the entry in a cell; useful for long entries; RETURN turns the function off

* Sort (within "Data" on the top menu) allows you to sort all or part of your table
  Data-range must be established to set which rows and columns will be moved around by the sort; while you may not want to sort all of the rows in your worksheet, you will probably want to include all columns for the selected rows
  Set the range by:
    Putting the cursor on the top, left-most column to be included
    Press the "." key [NOT "DEL"]
    Move the cursor down until you reach the last left-most column to be included
    Move the cursor to the right until you reach the right-most column to be included
    Press ENTER
  Primary-range establishes the field to be used as the basis of the sort; type the first and last separated by two dots (e.g. "C5..C37")
  Secondary-range establishes a second range to be used when there are two or more primary keys which match
  Go will actually execute the sort and cause the table on your screen to be rearranged

* Window function (F6) allows you to reposition a portion of your worksheet; you may split the worksheet horizontally or vertically
  Press F6 to move from one window to another
  Press ESC to turn the window function off

* Print allows you to print all or part of your worksheet
  "Printer" will allow you to direct your output to an attached printer. You must set the range; you can do this in the same way that you set the sort range.
  "File" will send a formated, print-ready copy of your worksheet to a file on your work disk for later printing.

* Query (within "Data" on the top menu) allows you to find all entries withing a given range which match the criteria you specify.

Notice that Lotus supplies easy methods of performing other operations, such as formatting disks, copying disks, viewing the files on your work disk, etc.

Use the HOME and END keys to get to the beginning and end of the table.
Use the PGDN and PGUP keys to move up and down through the table a screen-full at a time, the TAB key to move sideways a screen-full at a time.

Cell entries

Cell size; defaults to 9 characters, but can be reset

Entries can be made in each "cell" of the worksheet by moving the cursor to that cell and typing the information which is to be put there

You can copy from one cell to another, or from a range of cells

Entry types are

Label--any entry beginning with a letter; labels are left-aligned by default and must remain that way if the field is to be sorted. [The default can be changed.]

Entries may be positioned within the cell by:

prefacing them with a "^"; text will be centered

prefacing them with a single quote; text will be left-aligned

prefacing them with a double quote; text will be right-aligned

Note: numerical entries are automatically left-aligned and must be to have formulas work correctly; label entries are automatically right-justified, and must be if they are to be sorted

Numeric--any entry beginning with a number and containing all numbers or numbers and a period; numeric data is right- justified by default and must be left that way for use in formulas

Formula--any entry beginning with a plus sign ("+")

@sum

@count

Note: you should never edit an entry which has been set with a formula; you may change the formula, however

SAVE YOUR WORK FREQUENTLY! Execute the save function to replace the file you are working on with your most recent changes.

LOTUS 1-2-3

Can be used for
- Memos
- Schedules
- Budgeting
- Is suitable for storing any 2-dimensional table

Guidance and instructions available from
- Manual; which is well indexed
- On-line help function (F1 key)
- Contacts on "IBM PC Software and Coordinators" list

Starting up LOTUS
- Insert into drive A either a LOTUS disk which has DOS installed on it, or insert the DOS disk before inserting the LOTUS disk.
- Key the current date and time when prompted for them; this is important for getting the correct date on any files you modify or create
- If you are using a LOTUS disk with DOS on it, you will be given the first LOTUS menu with the cursor (or highlight) on the menu item "1-2-3". Simply press the ENTER, (or RETURN) key. If you get a DOS prompt ("A>"), remove the DOS disk, insert the LOTUS disk, and type "lotus" and the ENTER key; this will be followed by the first LOTUS menu. You will see the copyright screen, and then a blank worksheet; you are now ready to begin using LOTUS.

Moving from function to function:
- With menus; to get the basic 1-2-3 menu, type "/", then select the function you want to execute by moving the highlight (or cursor) to that function and pressing the ENTER key
- With commands; once you are familiar with the function names, type the first letter of that function. To do this, you must have a menu on your screen. For example, when you are on the basic 1-2-3 menu, instead of moving the cursor to "File", you can type "f". To get the basic menu, you must type "/", but if you know you want the file function, you may type "/f", or, for example, for the worksheet-window-clear, you may type "/wwc".

Getting out of a function; ESC will take you from one menu level up to the next. If you want to return to worksheet revision, press ESC until there are no more menus.

Use the File function and then Retrieve (or, "/fr") to move a copy of an existing file into your worksheet area.

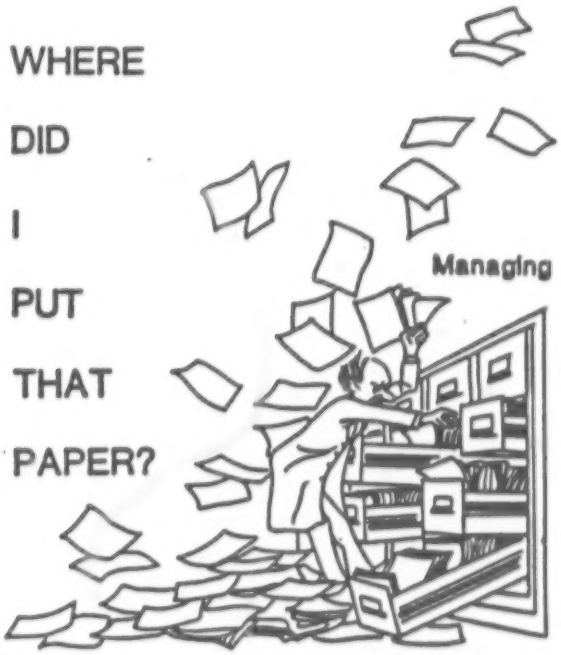
Creating a worksheet
- Moving around the worksheet
  - Use the arrow keys (left, right, up, down) on the number pad
  - Use the GOTO function key (F5) followed by the "cell" address (e.g., "A5", or "C10", or "E23" etc.)

ORGANIZATION OF REPRINT FILES

Library Update / 1985

Camille Wanat, Physics Library

WHERE DID I PUT THAT PAPER?



Managing your Personal Information Files

WHY BOTHER WITH KEEPING A PERSONAL COLLECTION OF PAPERS?

Personal research files are important information resources since the papers in them are:

familiar,
relevant,
evaluated,
arranged according to personal interests, and
conveniently located.

Goals for a Personal Information File:

- **be a select collection of key papers**
- **prevent information once gained from being lost**
- **provide for subject retrieval**
- **provide for author retrieval**
- **facilitate evaluation & organization of knowledge**
- **make research & writing easier**

PERSONAL FILE PRINCIPLES:

1. **Every system needs to plan for change.**
2. **Every system needs to plan for growth.**
3. **As a collection grows linearly, the difficulty of finding a given item increases exponentially.**
4. **There is an inverse relationship between the effort expended in placing a document into the file and the effort necessary to retrieve that document later.**
5. **If a system takes too much effort to keep up, it will fail.**

3 BASIC TYPES OF ARRANGEMENTS FOR PERSONAL RESEARCH FILES:

* single-access systems: papers arranged by either author or subject
* multiple-access systems: papers arranged by author, subject, or accession #, plus an additional index to the papers is maintained. Many variations of multiple-access systems exist.
* computer-assisted systems: a special type of a multiple-access system. Exact configuration depends on available resources.

SINGLE ACCESS SYSTEMS:

You should consider this method if:

- your collection is relatively small,
- you usually go to your file for a few good articles,
- you search your files often but not constantly,
  or
- you usually search for articles you know are in your file.

Advantages:

- small labor input
- articles are browsable by subject
- subject terms can be personalized
- equipment and supplies are readily available

Disadvantages:

- subject files lose author access, and vice-versa
- difficulty in choosing subject term
- difficulty with the article that needs 2 or more subject headings

MULTIPLE ACCESS SYSTEMS:

You should consider this method if:

- you want to find articles which could be filed under 2 or more topics,
- you need both author and subject access,
- you want to find all pertinent articles in your file,
  or
- your collection is relatively large.

Advantages:

- access to known items
- usually greater evaluation of documents
- any number of subject terms can be used per article
- some of the work can be delegated
- the index acts as a surrogate for the document

Disadvantages:

- greater investment in time and effort
- some systems sacrifice direct browsability by subject

COMPUTER ASSISTED SYSTEMS:

You should consider this method if:

- your file is unusually large and growing rapidly,
- you can afford the initial investment,
- you really need access through a variety of keywords, subjects, authors,
  or
- you have the time, the inclination, and the access to a computer.

Advantages:

- multiple access points easily available
- sophisticated retrieval possibilities
- time saving - once the systems is operational
- printed bibliographies possible

Disadvantages:

- rigorous input necessary
- data entry for a large file can be formidable
- high start-up costs

SINGLE-ACCESS SYSTEM ** ARRANGED BY SUBJECT

A. SUBJECT HEADING LIST

EXAMPLE

LISTS OF INDEX TERMS

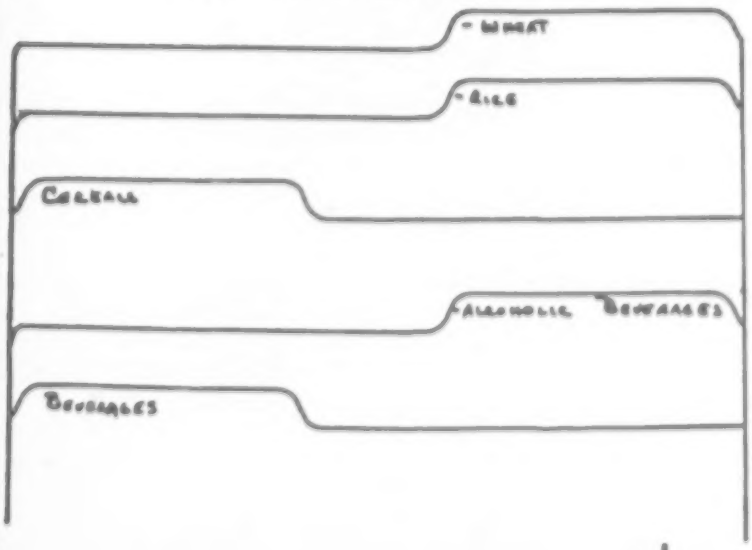
Classified Arrangement	Alphabetic Arrangement
Beverages	Alcoholic Beverages
Alcoholic Beverages	Barley
Beer	Beer
Wine	Beverages
Carbonated Beverages	Carbonated Beverages
Coffee	Cereals
Milk	Coconuts
Mineral Waters	Coffee
Tea	Corn
	Eggs
Food	Food
.	Grain
.	Legumes
Cereals	Milk
Grain	Mineral Waters
Barley	Nuts
Corn	Peanuts
.	Rice
Rice	Tea
.	Vegetables
Wheat	Wheat
.	Wine
Eggs	
.	
Nuts	
Coconuts	
Peanuts	
.	
Vegetables	
Legumes	

B. PAPERS ARE ASSIGNED SUBJECT TERMS

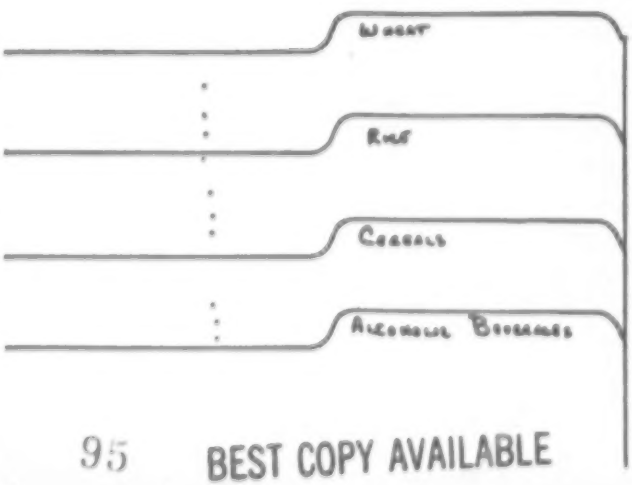
California Rice Culture
RICE
Sowing seed and herbicide by air and explaining other modern agricultural methods, California rice growers achieve remarkably high yields that play an important role in the world rice market
by J. Hall Bonner and D. Medlin Bowden
ALCOHOLIC BEVERAGES
The making of great whisky
The Wild Gene Resources of Wheat
WHEAT
Modern plant-breeding practices have reduced the genetic variability of the cultivated wheats. The best hope for future crop improvement lies in exploiting the abundant gene pool of the plant's wild relatives
by Mireko Feldman and Bowen S. Bowe
CEREALS
Triticale: the birth of a new cereal

C. PAPERS ARE PLACED IN FOLDERS IN EITHER

A CLASSIFIED ARRANGEMENT OR



AN ALPHABETIC ARRANGEMENT.



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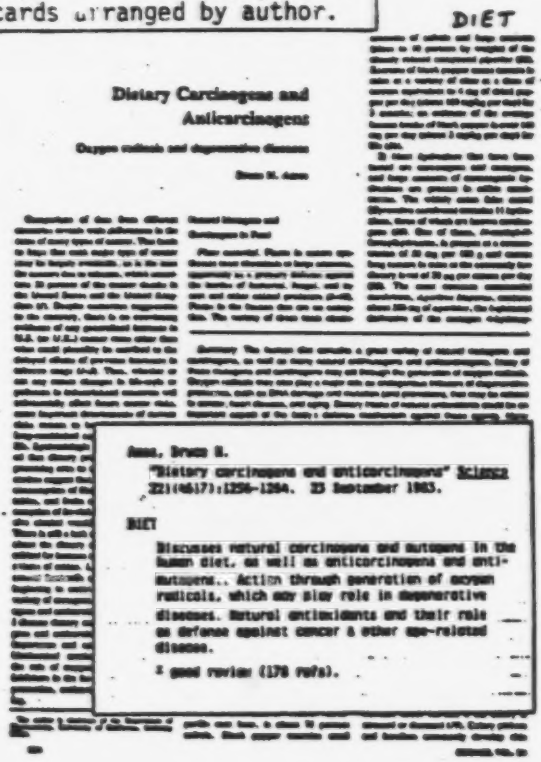
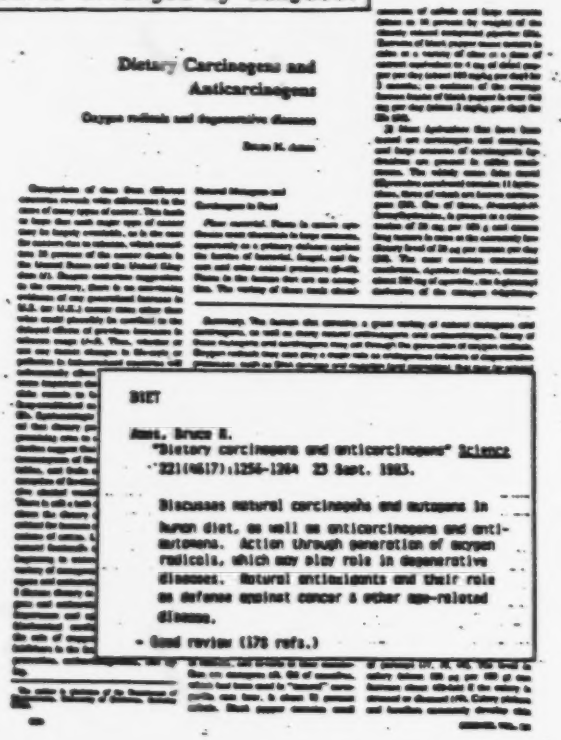
MULTIPLE-ACCESS SYSTEMS ** INDEX CARD SYSTEMS

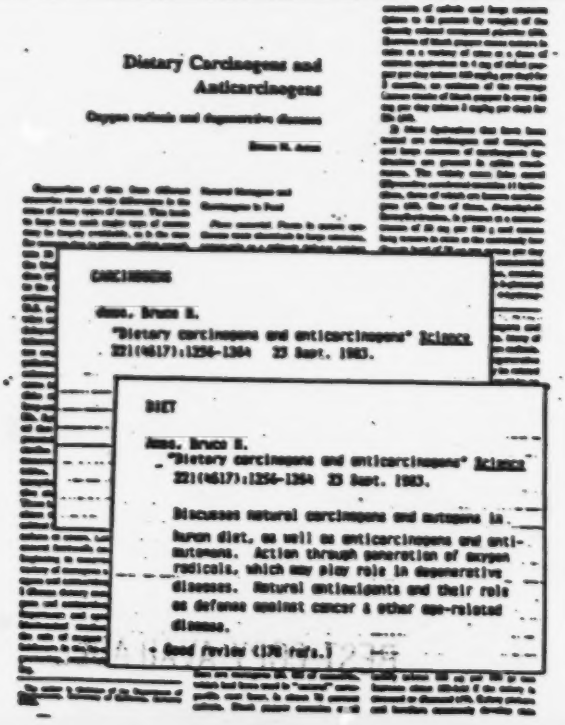
I. Papers arranged by subject; cards arranged by author.


DIET
Dietary Carcinogens and Anticarcinogens
Oxygen radicals and degenerative diseases
Ames, Bruce N.
"Dietary carcinogens and anticarcinogens" Science 221(4617):1256-1264. 23 September 1983.
DIET
Discusses natural carcinogens and mutagens in the human diet, as well as anticarcinogens and antimutagens.. Action through generation of oxygen radicals, which may play role in degenerative diseases. Natural antioxidants and their role as defense against cancer & other age-related disease.
* good review (178 refs).

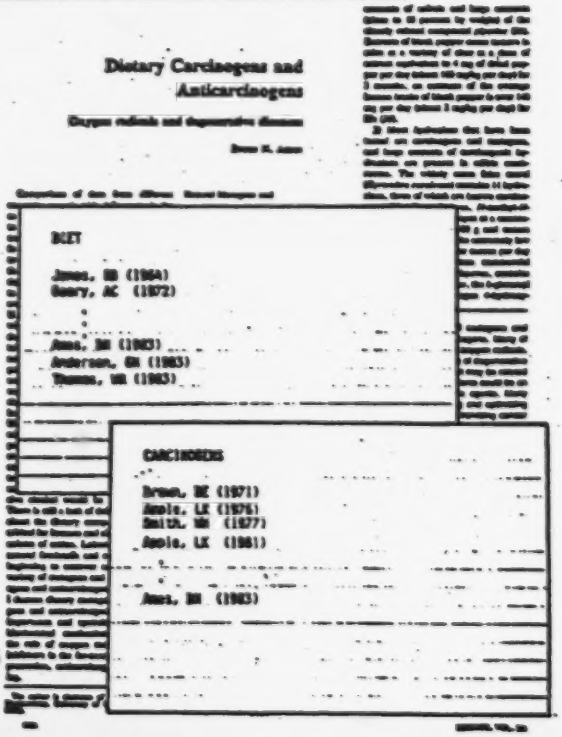
II. Papers arranged by author; cards arranged by subject.


Dietary Carcinogens and Anticarcinogens
Oxygen radicals and degenerative diseases
DIET
Ames, Bruce N.
"Dietary carcinogens and anticarcinogens" Science 221(4617):1256-1264 23 Sept. 1983.
Discusses natural carcinogens and mutagens in human diet, as well as anticarcinogens and antimutagens. Action through generation of oxygen radicals, which may play role in degenerative diseases. Natural antioxidants and their role as defense against cancer & other age-related disease.
- Good review (178 refs.)

III. Papers arranged by author; cards (more than 1 per paper) by subject.

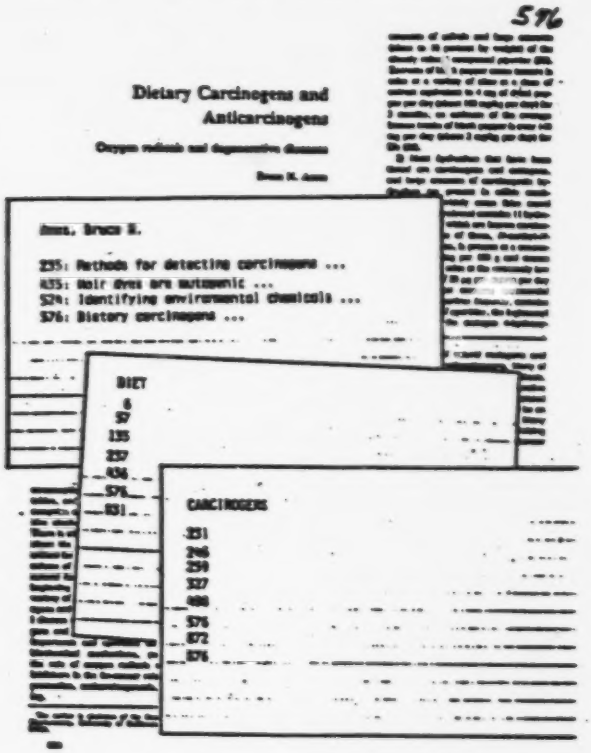

Dietary Carcinogens and Anticarcinogens
Oxygen radicals and degenerative diseases
CARCINOGENS
Ames, Bruce N.
"Dietary carcinogens and anticarcinogens" Science 221(4617):1256-1264 23 Sept. 1983.
DIET
Ames, Bruce N.
"Dietary carcinogens and anticarcinogens" Science 221(4617):1256-1264 23 Sept. 1983.
Discusses natural carcinogens and mutagens in human diet, as well as anticarcinogens and antimutagens. Action through generation of oxygen radicals, which may play role in degenerative diseases. Natural antioxidants and their role as defense against cancer & other age-related disease.
+ Good review (178 refs.)

IV. Papers arranged by author; brief subject cards.

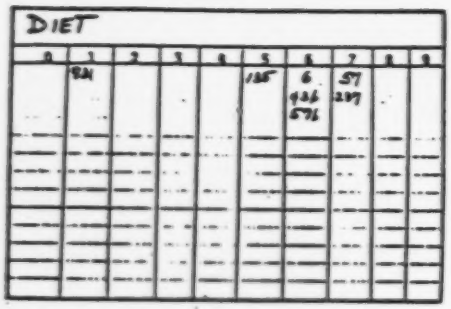


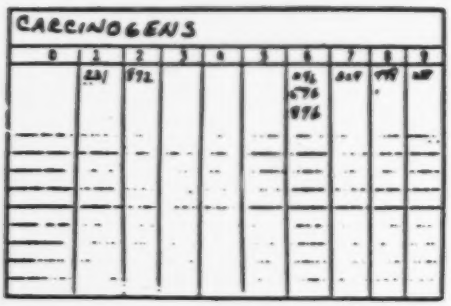
MULTIPLE-ACCESS SYSTEMS (CONT'D)

V. Papers arranged by accession number; author cards; subject cards.



VI. Same as V., using alternate notation on subject cards to facilitate coordination of subjects.





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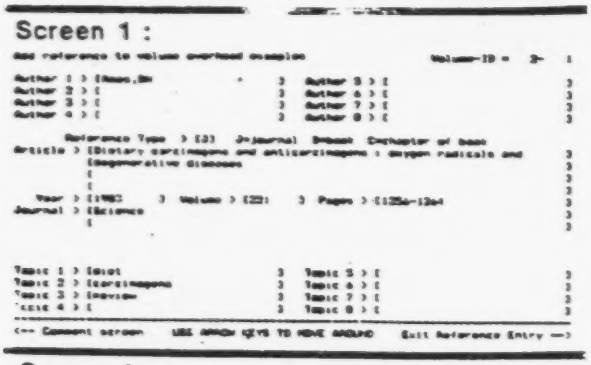
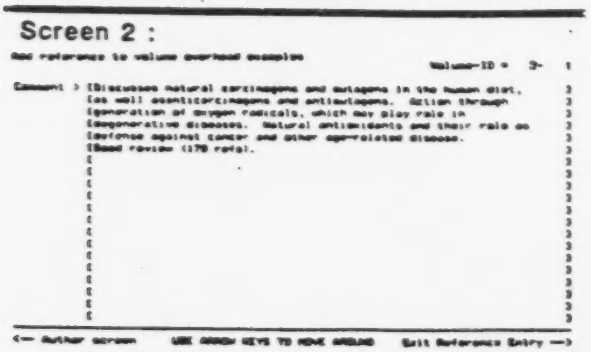
COMPUTER-ASSISTED SYSTEMS - MICROCOMPUTER BASED

A. Basic bibliographic information is entered into the database:

Screen 1 :



Screen 2 :

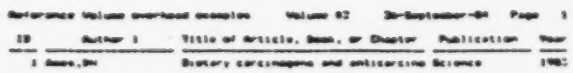


(system: REF-11)

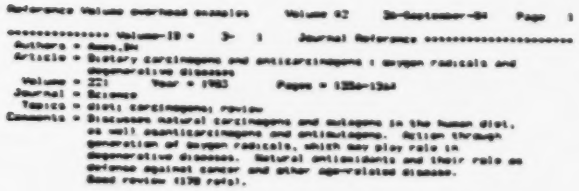
B. Various types of output are often possible, sometimes including varying citation formats:

OUTPUT - SAMPLE LISTINGS

Brief Listing:



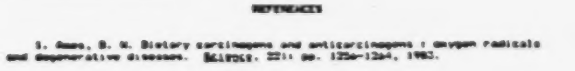
Full Listing:



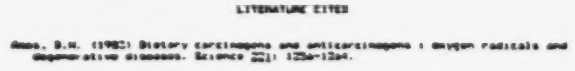
(system. REF-11)

OUTPUT FORMATTED FOR PUBLICATION

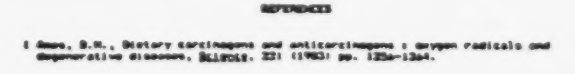
Sample 1 :



Sample 2 :



Sample 3 :



(system: REF-11)

C. Some databases can be searched by author, subjects, date, publication, and/or keywords (often in combination) -- depending on the capabilities of the software system.

POINTS TO CONSIDER FOR BIBLIOGRAPHIC SOFTWARE:

- ease of use
- stand-alone package or requires other software (e.g., word processing)?
- various record and file constraints:
  - size of file
  - size of record
  - number, type, and length of fields
  - multiple equivalent fields
  - character set allowed
- editing capabilities
- ability to accept imported files
- indexing/keyword capabilities:
  - ability to generate a list of keywords used
  - are keywords coded?
  - limitations on number of keywords?
- searching capabilities:
  - specified fields only (e.g., keyword or index field)?
  - free text in entire record?
  - Boolean combinations?
  - sensitive to capitalization, punctuation?
  - truncation, wild cards?
  - proximity searching?
  - search across multiple files or disks
- ability to print to paper and/or disk
- flexibility of report generation
  - sort capabilities
- varying citation formats for output
  - ability to define own formats?

The above checklist can help in evaluating a bibliographic software package. No package has -- or needs -- all the features implied by this list. What is important is how well the particular mix of features in a given software package meets your indifidual file maintenance, retrieval, and bibliographic needs.

SOFTWARE FOR REPRINT FILE MANAGEMENT (Not included in SPEC Kit)
A selection of software specifically designed for the management of bibliographic citations on a personal scale. For fuller information, please see software reviews or vendor documentation.

ORGANIZATION OF PERSONAL FILES - A Select Bibliography

General overviews of filing systems:

Alarcon, R. "A personal medical reference index." Lancet 1(7589): 301-305, 8 Feb. 1969.

Cushing, R. "Improving personal filing systems." Chemical Engineering 70 : 73-86, 7 Jan. 1963.

Foskett, A.C. "Personal indexes." In : Mildren, K.W.,ed., Use of Engineering Literature. London : Butterworths, 1976. pp.184-200.

Jahoda, G. Information Storage and Retrieval Systems for Individual Researchers. New York : Wiley-Interscience, 1970.

Stibic, V. Personal Documentation for Professionals: Means and Methods. New York : North-Holland, 1980.

Stibic, V. "Personal information management." In : Stibic, V. Tools of the Mind : Techniques and Methods for Intellectual Work. Amsterdam : North-Holland, 1982.

Single access sytems:

Bartlett, L.C. "Filed and found : a personal information storage and retrieval system." JAMA 199(13) : 244-45,250,264, 27 March 1967.

Ringel, M. "Filed for easy reference." Medical Group Management 27(1) : 40-41, Jan.-Feb.1980.

Singer, K. "Where did I see that article?" JAMA 241(14) : 1492-1493 6 April 1979.

Multiple access systems - manual:

Holmes, T.F. and C.G. Gentry. "A foolproof personal filing system." Audiovisual Instruction 24(5) : 40-42, May 1979.

Reishus, A.D. "Try this filing system for retrieving medical pearls." Medical Economics 56(13) : 137-138, 9 July 1979.

Richardson, L.R. "A simple system for reprint filing." Science 104(2695) : 181-182, 23 August 1946.

Computer-assisted systems - minis and mainframes:

Beckley, R.F. and H.L. Bleich. "Paper chase : a computer-based reprint storage and retrieval system." Computers and Biomedical Research 10(4) : 423-430, 1977.

Calvin, W.H. "A computer-assisted personal literature reference system." Computer Programs in Biomedicine 2 : 291-296, 1972.

Faulhaber, C. "Managing bibliographic data : the Kinmonth card file system." Computing Services Newsletter (UC Berkeley) 7(4-5) : 29-30, April-May 1984.

Lipsett, F.R. and A.B. Haycock. "Preparation of personal bibliographies using a large computing facility." Journal of Chemical Information & Computer Sciences 22 : 1-4, 1982.

Marks, R.H.L. " A Fortran computer program for storage and retrieval of personal journal references." International Journal of Bio-Medical Computing 12 :283-290, 1981.

Computer-assisted systems - microcomputers:

Bertrand, D. and C.R. Bader. "Storage and retrieval of bibliographic references using a microprocessor system." International Journal of Bio-Medical Computing 11 : 285-293, 1980.

Garfield, E. "The integrated Sci-Mate Software System. Part 1: combining file management, online access, and searching with manuscript editing." Current Contents no.38 : 3-10, 23 September 1985.

Haymaker, R. "PC database for high energy preprint collections." DOE/ER/05490-68, June 1985.

Rowell, P.P. and N. Utterback. "Scientific literature currency and organization using a microcomputer." Online : 18-21, Jan. 1984.

Smith, S.F. et al. "PULSAR: a personalized microcomputer-based system for keyword search & retrieval of literature information." Journal of Chemical Information and Computer Science 21 : 209-213, 1981.

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spec
OMS
Systems and Procedures Exchange Center

Changing Audiences

Consult the Library Directory in Norlin or the University Telephone Directory for the name of the librarian and location of the branch and divisional libraries.

Computer Based Reference Service

To satisfy requests for bibliographic literature searches, the Libraries have access via computer to over 100 different data bases. The rapid machine searching of data allows the creation of bibliographies tailored to specific user needs. Such information sources as *Chemical Abstracts, Psychological Abstracts, Social Science Citation Index*, and *ERIC* are representative types of data bases presently available for machine-searching. COSTS OF THE SEARCH ARE BORNE BY THE USER. For more information contact a subject librarian in Norlin or the branches.

Ordering Library Materials

The informed advice of the University's faculty is of critical importance to the Libraries' collection development program. Purchase requests should be routed through the academic department book chairperson, the appropriate library subject bibliographer, or the Associate Director responsible for collection development. A typed order form need not accompany the request, but orders can be processed more rapidly if accurate and complete bibliographic information is provided.

A list of subject bibliographers is available from the Library Administration Office.

Photocopying Services

Photocopying services are available in Norlin and the branch and divisional libraries. Faculty members may charge photocopying services to their University accounts.

Book Pickup Service

Faculty members on the Boulder Campus can call the Circulation Department in Norlin to have library materials picked up and returned to Norlin. This service is for materials no longer needed. Renewal of loans is considered a new transaction and can only be completed by bringing the material due for renewal to the circulation desk from which the item was charged out.

Faculty Carrels

A small number of private faculty carrels are available in Norlin Library. The Library follows guidelines established by the Boulder Faculty Assembly Libraries Committee in assigning these carrels. Application forms are available by calling the office of the Assistant Director for Public Services.

SERVICES

Reference and Information Services

The Reference Department in Norlin and the reference desks in the branch and divisional libraries serve as the central information points for the University Libraries. The primary duty of the staff in these areas is to provide personal assistance to individuals in pursuit of information and to assist in making the most effective use of the Libraries' facilities and collections. In addition to answering questions and providing bibliographic instruction, the following services are also provided:

- Classroom lectures (see Instruction—Classroom Instruction)
- Computer based reference service (see Services—Computer Based Reference Service)
- Current awareness service
- Supervision and training of research assistants in literature searching and in compilation of bibliographies
- Telephone reference service (for quick and factual questions)

For the above services, consult the appropriate branch or divisional librarian or subject bibliographer.

The Reference Department in Norlin Library houses the general reference collection and the reference works relating to the Social Sciences and Humanities. The collection has extensive holdings of general encyclopedias, dictionaries, handbooks, national bibliographies, catalogs of major research collections, periodicals and newspaper indexes, as well as other reference sources essential to a research collection. Special subject needs not met by the Norlin Reference collection are best satisfied in the branch or divisional library which contains the book and journal collection of the subject. Each of these libraries maintains a reference collection suitable to its subject, and the librarians are specialists in the literature of their subject area. Listed below are the branch and divisional libraries located on the Boulder Campus.

- Art and Architecture
- Audio-Visual/ Microforms
- Business
- Earth Science
- Engineering
- Government Publications
- Law
- Map
- Math-Physics
- Music
- Science
- Special Collections
- Western Historical Collections and University Archives

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Ohio State University

Graduate Student Research Workshops

A SERIES OF WORKSHOPS DESIGNED FOR GRADUATE STUDENTS BEGINNING MAJOR LIBRARY RESEARCH.

Each presentation will include:

Planning Your Research

HOW TO CHOOSE A TOPIC AND DETERMINE APPROPRIATE SOURCES FOR YOUR TERM PAPER, THESIS OR DISSERTATION.

Computerized Searching

HOW TO UTILIZE LCS (THE LIBRARIES' COMPUTERIZED CATALOG) AND ONLINE COMPUTER SEARCH SERVICES OF THE OSU LIBRARIES.

Sample Subject Search

A DEMONSTRATION VIA LARGE-SCREEN PROJECTION OF LCS AND ONLINE COMPUTER DATABASE SEARCHING.

ALL WORKSHOPS WILL BE HELD IN ROOM 120,

BAKER SYSTEMS ENGINEERING

5:00 - 7:00 P.M.

- **TUESDAY, APRIL 23 - RESEARCH IN THE ARTS & HUMANITIES**
- **WEDNESDAY, APRIL 24 - RESEARCH IN THE SOCIAL SCIENCES**
- **THURSDAY, APRIL 25 - RESEARCH IN THE SCIENCES**

INSTRUCTION

The instructional program provided by the University Libraries strives to support the teaching program of the University and to help students make better use of library resources. To satisfy the various levels of need the Libraries provide a full line of instructional programs ranging from a *SELF-GUIDED TOUR* to *THESIS/DISSERTATION RESEARCH TECHNIQUES*.

Tours

A self-guided tour packet for Norlin Library is designed to familiarize students with the physical layout of the facilities and to increase their awareness of the services available. Instructional handouts on the use of the card catalog and periodical indexes are included in the packet. The self-paced instructional device was developed to correct the inadequacies of the guided group tour. The packet can be obtained at the Information Desk in Norlin Library.

Classroom Instruction in Library Use

Librarians share with other faculty a concern for improving students' skills in the use of information sources. If a library project is in the offing, Library faculty are prepared to meet with any class to discuss pertinent information sources and effective literature search strategies. A library presentation can be arranged with the appropriate subject librarian or with the Instruction Librarian, Norlin Library Reference Department.

Workshops

The Library staff conducts instructional workshops throughout the year to help the student overcome general obstacles to effective library use. The topics covered in these workshops range from the Card Catalog, Periodical Indexes, and Term Paper Techniques to the bibliography and research tools of a particular subject, such as Anthropology. Workshops can be created to meet the special needs of the individual teaching faculty and to support the educational mission of departments.

Workshops can be arranged with the appropriate subject librarian or with the Instruction Librarian, Norlin Library Reference Department.

Thesis/Dissertation Research Techniques

The Library offers an intensive mini-course in general library research techniques for the graduate student. The course is designed to supplement existing instruction and to refine the graduate student's library skills. The thrust of the course is to instruct the student in the use and capabilities of the major sources of bibliographic information as opposed to sources for factual reference information. The course covers such topics as writing a prospectus, locating research-in-progress and research completed, and bibliographic searching techniques. Each participant is assigned a library advisor for the duration of the student's thesis/dissertation program. Throughout the course, instruction is provided by the advisor in the specialized resources related to the research topic. For information, contact the Assistant Director for Public Services in Norlin Library. There is a nominal fee.

THE LOIIS PROGRAM

Final Report

Opritsa Popa and Irene Hoffman

INTRODUCTION:

Every year, the rich curriculum at U.C. Davis attracts hundreds of foreign students with diversified intellectual interests. Librarians often see them lost in the stacks, struggling with the card catalog or attempting to understand and use complicated indices. However, timidity and language difficulties prevent them from using our reference services efficiently. This year, for the first time, the Library is actively participating in a campus-wide effort to help foreign students adjust socially and academically to their new environment. The Davis Library program, named LOIIS (Library Orientation and Instruction for International Students) was started during 1984 Fall Quarter Orientation Week.

GOAL:

The goal of LOIIS is to contribute to the academic integration of international students by helping them function independently and effectively in the library. In order to successfully reach this goal, the teaching process as well as any other interaction must occur in an atmosphere that fosters understanding and communication. Therefore, educating Library staff on cultural differences became an essential element of the LOIIS Program.

METHODOLOGY:

The LOIIS Program evolved in three stages:

1. The Learning Stage--consisted of the accumulation of necessary observations and data to tackle the problem. This was achieved through the following:

   a. Reference Desk observations
      Discussions with foreign students
      Discussions with overseas counselors and foreign Librarians

   b. Meeting with members of the SISS who provided us with a profile of the Davis foreign population.

   c. Extensive literature searching and study

2. The Sharing Stage

   During the information gathering process we became aware of generalizations and misconceptions often associated with foreign students. Sharing this newly acquired knowledge with our colleagues was considered beneficial to a successful student/staff interaction.

We took a two-pronged approach:

a. Informal presentation at monthly ESC meetings and notices in The CUD (appendix 2)

b. Two formal presentations on cross-cultural dynamics featuring speakers specializing in cultural awareness (appendix 6 and 6a)

3. Teaching the International Students

The teaching stage was planned as a three step process:

a. The creation of the LOIIS Network

A network of twelve volunteers was established. The purpose of the LOIIS Network is to give international students an opportunity to contact a librarian directly, if a special library need or problem arises. The LOIIS Librarians met in weekly sessions to get acquainted, brainstorm, discuss articles, debate LOIIS goals.

b. The design of the brochure, handout and questionnaire

A simple, attractive brochure became the LOIIS calling card. It explains the purpose of the LOIIS Program and includes basic information on the Library, its branches, hours, etc. It also contains a list of all LOIIS librarians, their phone numbers and area of specialization. (appendix 1)

The library handout, the backbone of the library tours, was designed to be both a glossary of library terms and an outline/guide to the stations covered during the tour. (appendix 4)

The questionnaire was designed to gather detailed data on library experiences in the home country and in the U.S. It will assist us in understanding the specific needs of this user group and tailor future programs to meet these needs. (appendix 3)

c. The planning of the lecture "Introduction to the Library" and the organization of the library tours.

The one hour presentation "Introduction to the Library" highlighted the library system, the strength of its collections and services. It explained the purpose of LOIIS and its network. A slide show about the library, adapted specifically to accompany the LOIIS presentation, was also shown. The lecture was followed by library tours. LOIIS Librarians acted as tour guides. Five tour groups with a maximum of ten students per group left the lobby every hour for three hours. The tours were synchronized so that each one covered all stations in a different but logical sequence, with-

out overlapping.

EVALUATION:

An evaluation form was distributed at the end of the tours. The form was structured to measure the student's library literacy, evaluate the library program (lecture, tour and handouts) and solicit additional comments and suggestions.

Of the 150 students attending the lecture, 105 participated in the library tours. Of these, 54--or 51%--completed and returned the evaluation form. Only four students rated their prior knowledge of the library as extensive, while two equal groups of 25 rated their knowledge as limited to non-existent.

Correlation of library literacy with the reported value of the program resulted as follows: The group with extensive library knowledge was too small to permit analysis. The groups with some or no library knowledge overwhelmingly (95%) rated the program as helpful or very helpful. In their comments the students praised the lecture and tours, favored the small size of the tour groups and requested an increase in tour time from 45 minutes to 1 1/2 hours. "Suffficient for a newcomer," "Thank you," "Excellent library," "Don't change anything. It's fine as it is," and "Offer it to transfers and freshmen," were some of the comments. One neutral comment read "I am indifferent."

The office of Services for International Students and Scholars provided us with the results of their own evaluation of the Orientation week program. LOIIS was evaluated as being the most helpful section of the entire Orientation Week. Out of a total of 105 responses, 70% rated the library lecture and tours good to excellent, 14% as fair, 2% as poor and 14% abstained.

From the participating librarians' point of view, the tours were favorably evaluated as well. At the "debriefing" session organized at the conclusion of Orientation Week, the participating LOIIS Librarians were invited to comment and criticize the program. The feedback was very positive. All commented on the interest and curiosity demonstrated by the international students. The organization and logistical execution of the tours was commended. The glossary was judged clear and instructive. The librarians enjoyed the involvement with LOIIS and were looking forward to a challenging quarter.

Overseas counselors and SISS members have expressed their endorsement for the creation and implementation of the LOIIS Program. (Appendix 9, 10 and 11)

The LOIIS Program was mentionned by the AUL for Public Services, Kate Mawdsley, in an article appearing in the Davis Enterprise, 9/19/84 (Appendix 7) as well as by C. Kirkendall, CRL News, October 1984, "BI Liaison Project Update." (Appendix 8)

University of California, Davis

LIBRARY ORIENTATION AND INSTRUCTION FOR INTERNATIONAL STUDENTS

Report to ESC
October 15, 1985

Opritsa Popa

INTRODUCTION

At the invitation of the Services for International Students and Scholars (SISS), the Library participated for the second consecutive year in welcoming 150 new international students to the Davis campus.

During the lecture and library tours, the incoming international students were introduced to the LOIIS program (Library Orientation and Instruction for International Students, its members, and its services. The lecture and the tours were organized and administered by Debbie Metzger and myself, with the help of 8 public service librarians. At the end of the orientation program the students were asked to complete a detailed questionnaire. Here are the results.

GEOGRAPHICAL BREAKDOWN AND ENGLISH LANGUAGE PROFICIENCY

The largest group of incoming international students (50%) is from East Asia. Of these 70% are from China, 23% from Japan, and 6% from Korea. The second largest group is from Europe (30%) followed by groups of students from Arab countries, Africa, India, Indonesia. Three-fourths of the incoming students consider their English language proficiency as adequate to excellent. Of the one-fourth remaining only a fraction (5%) consider their English knowledge as deficient. Based on this statistic, we concluded that the international students may be funneled into existing BI programs (English 28, Entomology 2, etc.) or directed to self-instruction audio-visual library media. For a majority of international students (68%) Davis is the first stop in the United States. They arrived less than 3 months prior to the beginning of the academic year.

ACADEMIC DEGREES SOUGHT

68% of the students are pursuing a degree in the Sciences (Biology and Agricultural Sciences prevailing). Only 16% study the Humanities, while another 10% study various fields in the Social Sciences. Graduate students form the majority (39%) while Ph.D. candidates represent a strong 20%.

LIBRARY USE IN THE HOME COUNTRY

According to their statements, half of the students used their home country library more than once a week, while 21% used it at least three times a month. In the majority of cases these libraries were much smaller than Shields Library. In finding their books, 71% of the students used the manual card catalog or browsed the shelves. One-fifth of all students turned to librarians for help. 12% coming from China, Sweden, and England reported using computerized card catalogs.

LIBRARY USE IN THE HOME COUNTRY (cont.)

Because the home country libraries are much smaller than our University Library, the prevalent retrieval method was self service. Only 9% of all students enjoyed mediated services: These were art students from China, medical students from Italy, and Spanish students, all coming from closed stack libraries. Over half of the students questioned reported having had library instruction (54%). Of these the largest group was from the Far East, followed by European students.

IMPACT OF THE LOIIS PROGRAM

The lecture Introduction to the Library and the library tours were judged as helpful or very helpful by the vast majority (95%). The handout Glossary of Library Terms was appreciated by 85%. This year we introduced an exercise as part of the library tour: We demonstrated how to find a book in the card catalog and on the MELVYL Online Catalog and how to find a periodical on the serials master list on microfiche. After noting the respective call numbers, we showed the students how to read the call number and find the items in the stacks. In the questionnaire we asked the students a) if after this demonstration they feel confident to find a book/journal in the library, b) if they feel uncertain but would know to turn to a librarian for help, c) if they did not grasp the concepts at all and would not know where to turn for help. 58% felt confident they could find needed items in the library, 40% felt still unsure, but understood the role of the reference librarian, 1.6% did not grasp the simple search strategy nor the concept of reference service. Was the level of comprehension the cause of this lack of understanding? By comparing English comprehension level to the negative answer, we realized that there really was no correlation: 80% of the students who did not understand how to find a book/journal in the library had above average English comprehension levels.

COMMENTS AND SUGGESTIONS

Student comments reflected some anxiety about their future performance in the library: The students pleaded for more detail during the tour, for more practical exercises in finding books/journals in the main card catalog and on the MELVYL Online Catalog. In asking for an extension of the tour time from 45 minutes to more than one hour, students echoed requests made by participants in last year's LOIIS tours.

CONCLUSIONS

Judging by the intense interest demonstrated by international students during the lecture and the tours and by the large number who volunteered to participate in the research study (my LAUC-D Research Grant) during which they were taught how to use the card catalog and MELVYL, it appears that the majority of the international students are very serious of purpose and eager to make the most out of their American sojourn.

NOTE: The results are based on 61 answers out of a total of 75 participating students.

MAIN CARD CATALOG

Main Card Catalog: The complete record of all the books, journals, microforms, recordings that are owned and available for use in the University of California, Davis libraries.

Catalog Cards: The cards in the Main Card Catalog which contain information about a publication, such as author, title and call number.

Subject Catalog: The section of the Main Card Catalog which lists books and periodicals alphabetically by subjects. The subject terms are chosen from the LC Subject Headings.

Author/Title Catalog: The section of the Main Card Catalog which lists books and periodicals alphabetically by authors and titles.

File Drawers: All the file trays in the Main Card Catalog which contain the catalog cards.

Call Number: A combination of letters and numbers that give the "address" of a book or other library materials.

Location Stamp: Name of a department or branch library that is stamped under the call number on the catalog card, indicating a special location for that publication.

LC or Library of Congress: Plays the role of a national library for the United States.

LC Classification: A letter/number code used at the Library of Congress and adopted by most United States university libraries, and used at UC Davis.

LC Subject Headings: Words and terms used by the Library of Congress to describe the subject matter of a book or periodical. UCD uses these same headings. Subject headings are listed in two red books next to the Main Card Catalog.

Stacks or Book Stacks: Rows of shelves where you will find books and bound periodicals. In the Shields Library the book stacks are on the 2nd, 3rd, and 4th floors.

Catalog Information Desk: A desk in the Main Card Catalog area that is staffed by a librarian Monday through Friday, 11-4. These librarians can help you if you have questions about how to use the card catalog.

New Book Truck: A shelf on wheels located near the elevators where new books are kept for two days before being put in the stacks.

Suggestion Box: A box opposite the elevators where you can put written comments, questions and suggestions about the Shields Library. A reply is usually posted every few weeks.

MELVYL

MELVYL: The computerized version of the main card catalog. Also referred to as the "ON-LINE CATALOG."

User Friendly: A term used for computers which refers to how easy the computer is to use.

COMMAND MODE: The COMMAND MODE is a direct line to information in Melvyl. This method of using Melvyl is fast and easy to use.

GOVERNMENT DOCUMENTS

Government Documents: Collection of works published by a government like California, the United States, France; or an organization composed of governments, like the United Nations.

Clipping File: Collection of newspaper articles and pamphlets on topics of current interest.

Census: Official counting of the population and their social and economic characteristics.

MICROCOPY COLLECTION

Microcopy Collection: A separate section of the library where microfilm, microcards, and microprint materials are kept.

Film Reels: The spools on which microfilm is rolled.

Microfiche: 11 x 15 cm. transparent plastic cards which contain microform reproductions of printed material.

Microprint: Large opaque cards containing microform reproductions of printed material.

Microcard: Small opaque cards containing microform reproductions of printed material.

Dissertation: The written summary of research that a Ph.D. student is required to turn in to receive his/her degree.

Thesis: The written summary of research that a graduate student is required to write to receive his/her master's degree.

Store: To keep for future use. Information may be stored in various forms: electronically, in print, in microfilm, in microfiche, etc.

STACKS or BOOK STACKS

Stacks or Book Stacks: Rows of shelves where books and bound periodicals are stored. In the Shields Library, the book stacks are on the 2nd, 3rd and 4th floors.

Location Guides/Maps: Floor plan of the library.

Open Stacks: Stacks are self-service and open for use to anyone.

Bound Journals: Typically, several older issues of a magazine, attached in book form for storage purposes.

PERIODICALS ROOM

Periodicals Room: The location of current periodicals, newspapers, and college catalogs.

Current Periodicals: The latest issues of journals, magazines, and newspapers received by the library.

Bound Journals: Individual issues of a journal put together by means of a binding.

College Catalogs: Information about other universities and colleges around the world.

Serials List, Serials Master List, or SML: Microfiche list of all journals in the University of California, Davis, libraries.

RESERVES AND UNDERGRADUATE READING ROOM

Undergraduate Reading Room: A study area open to all students, 24 hours a day.

Required Reserve Readings: Special publications that have been assigned to read by an instructor.

Reserves: A place in the Undergraduate Reading Room where required readings are kept and are available for loan.

Exam Files: Copies of tests that have been given in previous years.

Audiovisual Room: A room in the undergraduate reading room that contains tape recorders, video tape machines, slide tape machines, and cassette players.

LOAN

Loan: The section of the library that lends materials, accepts returned materials and handles search requests for library materials.

Borrow:
Checkout:
Circulate:
Charge Out: Words used for the lending of library materials.

Library Card: Plastic card used to check out a book. Apply for a card at the Loan Desk. Bring your current registration card.

Loan Period: The length of time one can take home library materials.

Due Date: The date by which a book must be returned to the library.

Renew: To extend the loan period for library materials.

Overdue: A book kept beyond its due date.

Fine: A fee that is charged to persons who have overdue library materials.

Turnstyle: A type of rotating gate that counts the number of persons entering the library.

HUMANITIES/SOCIAL SCIENCES AND BIOLOGICAL/AGRICULTURAL SCIENCES

Reference Librarian: Person trained to help students locate information and materials in the library.

Reference Desk: Location in the library where a reference librarian is on duty to answer questions.

Reference Books: Special books that do not circulate and are used to answer specific information questions.

Telephone Directories: Alphabetical listing of people's names, addresses, telephone numbers for a geographical area.

Indexes: Listings of journal articles usually arranged by subject, author or title.

Abstracts: Brief summary of articles, usually arranged by subject.

Annual Reports: Summaries of business activity prepared by corporations.

Encyclopedias: Comprehensive work about a field of knowledge presenting general information; usually arranged alphabetically by subject.

Vertical File or Pamphlet Collection: Collection of booklets and newspaper articles on subjects of current or popular interest.

INTERLIBRARY LOAN

Interlibrary Loan: Agreement among libraries world-wide, through which UCD may borrow materials that it doesn't have in its own library collection.

Request Form: Cards filled out to request books and periodical articles from other libraries.

Bibliographic Information: Description of a publication which includes such things as author, title, journal name, volume, pages, and date. These items are required on interlibrary loan request forms to help identify and locate a specific book or journal article.

EVALUATION FORM

LOIIS ORIENTATION LECTURE AND LIBRARY TOUR

1. Native language (check one)

__Arabic	__French	__Japanese	__Spanish
__Cantonese	__German	__Korean	__Taiwanese
__Chinese	__Hausa	__Malay	__Thai
__English	__Ibo	__Mandarin	__Yoruba
__Farsi	__Italian	__Portuguese	__Other_____ (please specify)

2. How would you rate your overall English language ability? (circle one)

Not fluent Fluent
1.....2.....3.....4.....5

3. How long have you been in the U.S.? (circle one)

0 - 3 months	4 - 6 months	6 months - 1 year	1 - 2 years	Longer than 2 years

4. Is Davis the first place you lived in the U.S.? Yes No

5. What curriculum (major) are you enrolled in? _____

6. What is the degree you are presently seeking? (check one)

__Bachelor of Arts	__Doctorate (Ph.D.)
__Bachelor of Science	__M.D.
__Master of Arts	__Other_____ (please specify)
__Master of Science	

7. Approximately how often did you use a library in your home country? (circle one)

Never	1-6 times per year	6-12 times per year	1-3 times per month	1 or more times per week

8. The collection of the library that you used most frequently in your home country was (circle one)

much smaller than UCD's	somewhat smaller than UCD's	about the same size as UCD's	somewhat larger than UCD's	much larger than UCD's

(continued on next page)

9. How did you find books/journals in the library in your home country? (check all that apply)

___ Used a card catalog

___ Used a computer

___ Asked for assistance

___ Looked on shelves

10. How did you obtain the books or journals? (check one)

___ The librarian brought me the books or journals

___ I went to the shelves and got the books or journals

___ Either the librarian or I went to the shelves to get the books or journals

11. Did you ever have any kind of library instruction in your country? (circle one)

Yes No

12. How would you rate the lecture "Introduction to the Library."

of limited help helpful very helpful

13. Did you find the tour of the library ...

of limited help helpful very helpful

14. Did you find the vocabulary and definitions ...

of limited help helpful very helpful

15. Do you think you could find a book that you need in the UC Davis Libraries? (circle one)

No | No. But I will ask a librarian to help me. | Yes. I know how to find it.

16. Do you think you could find a journal you need in the UC Davis libraries? (circle one)

No | No. But I could ask a librarian to help me. | Yes. I know how to find it.

Any additional comments, suggestions for future lectures and tours?

Please feel free to let us know!

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Select Bibliography

SELECT BIBLIOGRAPHY

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USES OF SPEC KITS

The Systems and Procedures Exchange Center (SPEC) is a clearinghouse operated by the Association of Research Libraries, Office of Management Studies that provides a central source of timely information and materials on the management and operations of large academic and research libraries. It facilitates the exchange of knowledge and documents through SPEC Kits, which are distributed ten times each year to ARL members and other interested libraries. The Kits include topically-arranged groupings of unedited primary source documents – selected for their value to administrators and decision-makers – that illustrate a wide range of alternative approaches to specfic issues.

Kit documents come from general membership surveys and from selected libraries contacted directly by SPEC, and most Kits are produced within six months of surveys. The documents' value comes from their variety of ideas, methods, and solutions. They are not viewed as finished products, but rather as points of departure for a library's planning efforts and as stimulants to innovative approaches to problem-solving. As such, Kits do not present answers or prescriptions for any one library; instead they illustrate how selected ARL members are planning for or dealing with particular issues. The worth of any one Kit to a particular library will depend upon the specific topic covered and the library's stage of development in that area.

Materials are selected according to the following criteria:

- Presents an approach of potential value to administrators and decision-makers
- Timely, and dealing directly with the topic under consideration
- Probability of application of ideas or thinking to other library situations
- Illustrative of actual practice, rather than theoretical
- Understandable, readable communication

All together, the materials should provide a range of alternative approaches that complement each other, provide variety, and stimulate comparison and contrast.

Libraries can take advantage of the Kit compilations in a number of ways. Administrators can evaluate the assumptions, methods, and results of other libraries' approaches; compare and contrast them; and use the learnings in their own situations. Library staff members can use the kits as professional development and current awareness tools. Committees and task forces can use them to begin a review of current practices. And the Kits can identify other persons or places to contact for further information. Back-up files in the SPEC office also are available for loan to member libraries. In addition, SPEC will conduct on-demand surveys or analyses geared specifically for a single library.

EVALUATION

Kit Title/Number _____

1. Which uses did the library make of this Kit?

2. Please indicate how useful the Kit was for these purposes.

☐ Very Useful ☐ Quite Useful ☐ Somewhat Useful ☐ Not Useful

3. Do you have suggestions for this Kit or for future Kits?

(optional)

NAME _____

LIBRARY _____

PHONE _____

Please return this form to the SPEC Center, OMS/ARL, 1527 New Hampshire Ave., N.W., Washington, DC 20036.

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